Quick Start Guide for Salesforce Case Management

How to check for open cases that are assigned your conference

- Click on Cases Tab.
- Click on the Conference your conference listview. This will show all of the open cases for your conference.
- Click on the Caseworker column and all of the unassigned cases will appear at the top of the screen. These are the cases that the Case Managers will need to assign to caseworkers.
- To assign caseworkers to cases, click on the pencil next to the caseworker field to go into edit mode. Then select the caseworker name from the predictive search box.

How to check for Assistance on a case

- From the case, look for the Assistance Icon. It is the green/teal colored square icon with the handshake.
- Click on the VIEW ALL button. This will show you the assistance on the case.
- To view the details of each assistance, click on the Assistance Name. (blue hyperlink)

How to record assistance on a case

- Click on the Assistance Name (looks like Assist-43000, blue hyperlink)
- This will take you to the assistance details.
- The amount requested field is filled in by the Call Center. This will tell you how much assistance in needed. Used mainly for assistance that will require a financial transaction from the treasurer – examples include rent, utilities. This field is not editable by the caseworkers.
- The amount provided field is filled in by the caseworker. This field contains the $ amount of the assistance that was provided to the client.
- Due to the reporting nature of the assistance data, the caseworker cannot delete assistance line items. If a caseworker decides not to assist with inkind goods/services, then delete the $ amount in the amount provided field.

How to submit a check request

- A check request is submitted when the caseworker enters a $ value in the amount provided field.
- **Important:** Once a value is entered in this field, an email notification is immediately sent to the treasurer. Do not enter a value in this field until you are sure that you need a check request.
- Once the treasurer approves the check request, the caseworker will receive an email notification that the check has been approved. (status = approved)

How to close a case with assistance

- Click on Status = Close. This will close with assistance.
- Cannot have any outstanding check requests.
- Enter date of visit and case type.
How to close a case without assistance

- Click on Status = Closed without assistance.
- Cannot have any outstanding check requests.
- Must enter a value in the reason closed without assistance field.
- Enter date of visit and case type.
- An error will occur if a case is closed without assistance and there is assistance recorded on the case.

How to enter hours and miles from within a case

- From within the case, click on the Mileage & Hours icon. (It’s the square green icon with a stopwatch usually found on the right side of the screen.)
- Click on the NEW button.
- Contact name = your name (caseworker). This is a predictive search box.
- The case number is automatically associated with the hours and miles.
- Enter total miles, total hours, description, and date.

How to enter hours and miles outside of a case  (used for training, meetings, pantry etc.)

- Click on the Mileage & Hours Tab at the top of the screen.
- Click on the NEW button.
- Contact name = your name (caseworker). This is a predictive search box.
- Enter total miles, total hours, description, date and reason.

How to see a list of your conference members

- Click on Accounts Tab.
- Click on the All Conferences listview.
- Scroll to your conference name and click on the blue hyperlink.
- Click of the Affiliated Contacts section and this will show you all of the members within your conference.

How to add the household budget

- From within the case, click on the household record for the client. This is usually the client’s name with the word “household” at the end.
- Click on the Household Budget icon. This is the yellow icon with a picture of a ledger.
- Click on the NEW button.
- The household name is automatically populated.
- Enter budget type, line item, and amount.
- This information will automatically appear in the total household budget totals on the household record. At the top of the screen in the Monthly Net Income field.

Please remember to enter:

- Gender, DOB, veteran status, ethnicity, household budget, household members and red flag information.