**November 8, 2021**

**Salesforce Check List**

**Note-This is not a complete list of everything that needs to be entered into Salesforce. This check list will serve as a reminder to ask for certain information that is not captured on the Intake Form and that may not always come up during a session.**

1. Owner Information
   1. Don’t Fill in Organization Name!
   2. FCC Site: CSS/EDCAP
   3. Coach: You
2. Contact Status (Courtney/Nancy may have to supply this info)
   1. Referral Source (Non-Profit, Presentation, Direct to Coach, etc.)
   2. Intake Method (Helpline, EDCAP Email)
3. Contact Information
   1. Address: At least get Borough or Town, State and Zip Code
   2. Try to get personal email & phone numbers. People leave jobs and work contact information may become obsolete.
4. EDCAP Case
   1. School Info. If you know the school but don’t know what type it is you can figure that out on [College Navigator](https://nces.ed.gov/collegenavigator/).
5. EDCAP Loans
   1. Loan Types: Know broad categories (Federal Direct, FFEL, Perkins, Consolidation, etc.)
   2. Loan Status: In Repayment, Forbearance, Deferment, In-School, Grace Period, Default.
   3. Current Servicer
   4. Current Loan Amount (At least have the total that pertains to each EDCAP case)
   5. Repayment Plan (If applicable)
   6. Fill in original loan amount or number of days past due (if applicable) if you have the information. Don’t worry if you don’t.
   7. You may have limited information about debt collectors. Fill in what you can.
6. EDCAP Service Details
   1. Outcome-Note: A case can’t be closed unless all outcomes are entered as “Completed”.
7. Closing Cases
   1. Enter closure reason
   2. Enter closure date
   3. Enter case savings (if applicable)
   4. Enter case savings date
8. Other Info:
   1. If a client has both federal and private loans, you will need to open two EDCAP cases.
   2. You can have multiple loans for one EDCAP case.
   3. You can have multiple Case Service Details for one EDCAP case.
   4. Once you close an EDCAP case, keep it closed. If the client comes back in the future with another issue, open a new case within their contact.