

Salesforce Checklist

November 21, 2022

Note-This is not a complete list of everything that needs to be entered into Salesforce. This checklist 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
 - a. The owner's name will be automatically assigned to a case when you login with your unique username and password.
 - b. Organization Name: Leave blank
 - c. FCC Site: Leave blank for now. Eventually, your agency name will be here.
 - d. Coach: Leave blank.
- 2) Contact Status
 - a. Referral Source (Non-Profit, Presentation, Direct to Coach, etc.)
 - b. Intake Method (Helpline, Program Email, etc.)
- 3) Contact Information
 - a. Address: At least get Borough or Town, State and Zip Code. Get full address if possible.
 - b. Try to get personal email & phone numbers. People leave jobs and work contact information may become obsolete.
- 4) EDCAP Case
 - a. School Info. If you know the school but don't know what type it is, try looking it up on [College Navigator](#).
- 5) EDCAP Loans
 - a. Loan Types: Know broad categories (Federal Direct, FFEL, Perkins, Consolidation, etc.)
 - b. Loan Status: In Repayment, Forbearance, Deferment, In-School, Grace Period, Default.
 - c. Current Servicer
 - d. Current Loan Amount (At least have the total that pertains to each EDCAP case)
 - e. Repayment Plan (If applicable)
 - f. Fill in original loan amount or number of days past due (if applicable) if you have the information. We recognize this isn't always easy to obtain.

6) EDCAP Service Details

- a. Outcome-Note: A case can't be closed unless all Case Service Detail outcomes are entered as "Completed".
- b. You must enter and complete at least one Case Service Detail before you can close a case.

7) Closing Cases

- a. Enter closure reason
- b. Enter closure date
- c. Enter case savings (if applicable)
- d. Enter case savings date
- e. There are several ways to close a case:
 - i. Enter the "Case Closure" section within the EDCAP Case or
 - ii. Click "Close EDCAP Case" within the EDCAP Case

8) Other Info:

- a. If the client has different types of student debt (federal, private, institutional), open separate EDCAP cases.
- b. You can have multiple loans, case service details and notes for one EDCAP case.
- c. 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.