

Client Data Upload & Entry

Training Manual

November 4, 2022

Overview

INTRODUCTION

California state departments that fund Butte County Office of Education's Back2Work programs require reporting of client information from intakes, exits, and monthly participation within each program and corresponding contract. Back2Work has developed a Salesforce repository to collect this client information from each subcontractor. Subcontractors may either upload their client information using .csv files or enter the data directly into the screens.

All documents and website links can be found in the Client Data section of the website: b2wdata.org

To request a login to the Salesforce repository email us at b2wdata@bcoe.org!

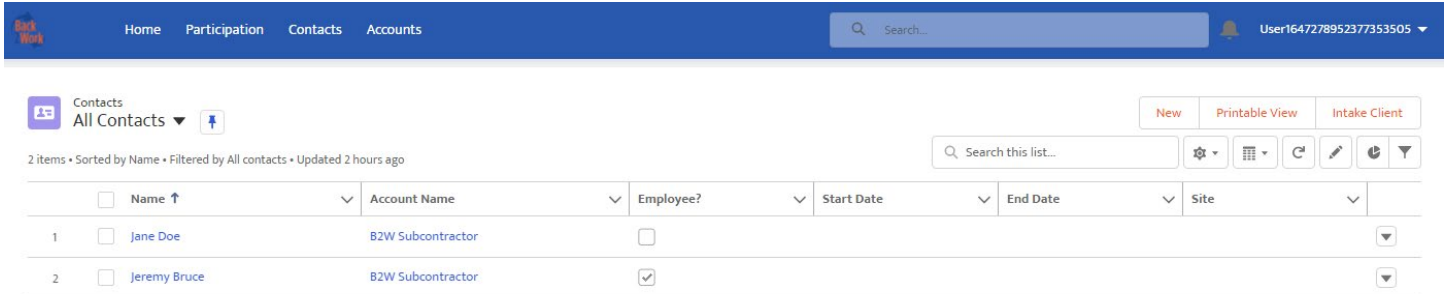
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SALESFORCE SCREEN ENTRY: CLIENT INTAKE

After logging into Salesforce you will be directed to the home screen that lists all contacts for your Organization. The list of contacts includes the Clients being served as well as the employees with authorization to access the clients within your organization.

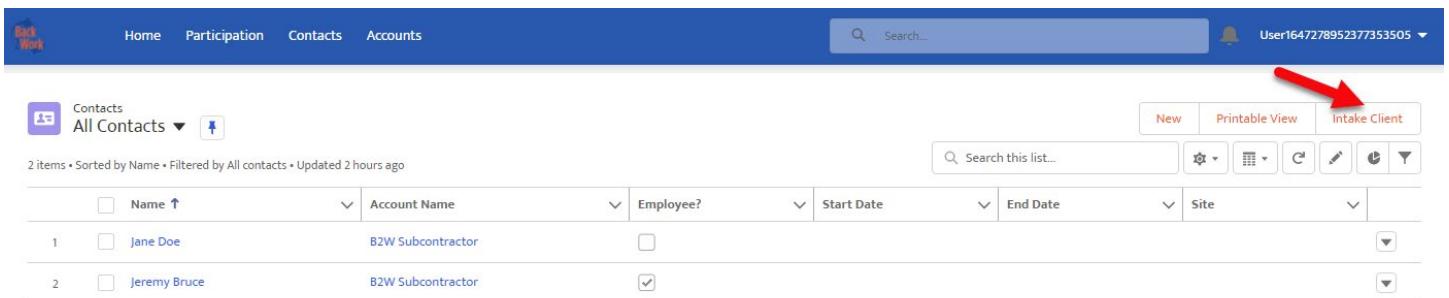


Contacts
All Contacts

2 items • Sorted by Name • Filtered by All contacts • Updated 2 hours ago

<input type="checkbox"/>	Name ↑	Account Name	Employee?	Start Date	End Date	Site
1	<input type="checkbox"/> Jane Doe	B2W Subcontractor	<input type="checkbox"/>			
2	<input type="checkbox"/> Jeremy Bruce	B2W Subcontractor	<input checked="" type="checkbox"/>			

Step 1. From the home screen in Salesforce click the “Client Intake” button to begin entering this client information:



Contacts
All Contacts

2 items • Sorted by Name • Filtered by All contacts • Updated 2 hours ago


<input type="checkbox"/>	Name ↑	Account Name	Employee?	Start Date	End Date	Site
1	<input type="checkbox"/> Jane Doe	B2W Subcontractor	<input type="checkbox"/>			
2	<input type="checkbox"/> Jeremy Bruce	B2W Subcontractor	<input checked="" type="checkbox"/>			

SALESFORCE SCREEN ENTRY: CLIENT INTAKE

After clicking the “Intake Client” button from the home screen you will be directed to a form to enter similar to this:

Basic Information:

*Subcontractor


*First Name

Phone

Middle Name/Initial

Email

*Last Name

Birthdate 

Address Information:

Address

Street

City State/Province

Zip/Postal Code Country

SALESFORCE SCREEN ENTRY: CLIENT INTAKE

Step 2. Begin filling out the client intake information and when finished click the “Next” button at the bottom:

Demographic Information:

Gender	Primary Race
--None--	--None--
Veteran	Hispanic, Latino, or Spanish Origin?
--None--	--None--
Highest Education Completed	Parole/Probation
--None--	<input type="checkbox"/> County Probation
Foster Care?	<input type="checkbox"/> State Parole
--None--	<input type="checkbox"/> Federal Supervision
Living Situation	<input type="checkbox"/> Justice-Involved Not On Supervision
--None--	<input type="checkbox"/> Non-Criminal Justice

Participant Information:

Start Date	District
<input type="text"/>	-- none selected --
Referred By	
<input type="text"/>	
Media Release?	
--None--	


Next

SALESFORCE SCREEN ENTRY: CLIENT INTAKE

After clicking “Next” on the Client Intake form, you will have the opportunity to upload a signed Client Release form:

Upload the client's media release form below:

Upload Media Release Form


 Or drop files

[Previous](#) [Next](#)

Step 3. Attach the file and click the “Next” button:

Upload the client's media release form below:

Upload Media Release Form

 Or drop files

[Previous](#) [Next](#)

After attaching a Media Release form click the “Finish” button to complete the Client Intake.

All Done! Click the **Finish** button to exit!

[Previous](#) [Finish](#)

SALESFORCE SCREEN ENTRY: MONTHLY PARTICIPATION

Step 1. From the Salesforce home screen select the client that has exited the program from the list of contacts:

Contacts
All Contacts ▾

3 items • Sorted by Name • Filtered by All contacts • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Name ↑	Account Name	Employee?	Start Date	End Date	Site
1	<input type="checkbox"/> Jane Doe	B2W Subcontractor	<input type="checkbox"/>			
2	<input type="checkbox"/> Jeremy Bruce	B2W Subcontractor	<input checked="" type="checkbox"/>			
3	<input type="checkbox"/> John Doe	B2W Subcontractor	<input type="checkbox"/>			

After clicking on a client from the Salesforce homepage in step 1, you will see a Contact Detail screen similar to this:

Contact
John Doe

+ Follow Edit Monthly Participation Exit Client ▾

Account Name Email Phone Mailing Address

[B2W Subcontractor](#)

Details Related

✓ Contact Details

Name John Doe	Referred By ⓘ
Account Name B2W Subcontractor	Employee? ⓘ <input type="checkbox"/>

Step 2. Click the “Monthly Participation” button on the Contact Detail screen:

Contact
John Doe

+ Follow Edit Monthly Participation Exit Client ▾

Account Name Email Phone Mailing Address

[B2W Subcontractor](#)

Details Related

✓ Contact Details

Name John Doe	Referred By ⓘ
Account Name B2W Subcontractor	Employee? ⓘ <input type="checkbox"/>

SALESFORCE SCREEN ENTRY: MONTHLY PARTICIPATION

After clicking the “Monthly Participation” button on step 2, you will see an Exit Client form similar to this:

Monthly Participation

* Participant

 ✕

Contract

- CDCR
- Clean California
- Caltrans
- District 11

* Month

District

* Year

Next

SALESFORCE SCREEN ENTRY: MONTHLY PARTICIPATION

Step 3. Fill out the Contract, Month and Year of participation, District, and Site. Then click “Next”:

Monthly Participation

* Participant

Contract

- CDCR
 Clean California
 Caltrans
 District 11

* Month

District

* Year

Site

Next

After clicking “Next” in step 3 you can either continue to add more Monthly Participation records or exit.

SALESFORCE SCREEN ENTRY: CLIENT EXIT

Step 1. From the Salesforce home screen select the client that has exited the program from the list of contacts:

Contacts
All Contacts ▾

3 items • Sorted by Name • Filtered by All contacts • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Name ↑	Account Name	Employee?	Start Date	End Date	Site
<input type="checkbox"/>	Jane Doe	B2W Subcontractor	<input type="checkbox"/>			
<input type="checkbox"/>	Jeremy Bruce	B2W Subcontractor	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	John Doe	B2W Subcontractor	<input type="checkbox"/>			

After clicking on a client from the Salesforce homepage in step 1, you will see a Contact Detail screen similar to this:

Contact
John Doe

+ Follow Edit Monthly Participation Exit Client ▾

Account Name Email Phone Mailing Address

[B2W Subcontractor](#)

Details Related

✓ Contact Details

Name John Doe Referred By ⓘ

Account Name B2W Subcontractor Employee? ⓘ

Step 2. Click the “Client Exit” button on the Contact Detail screen:

Contact
John Doe

+ Follow Edit Monthly Participation Exit Client ▾

Account Name Email Phone Mailing Address

[B2W Subcontractor](#)

Details Related

✓ Contact Details

Name John Doe Referred By ⓘ


Account Name B2W Subcontractor Employee? ⓘ

SALESFORCE SCREEN ENTRY: CLIENT EXIT

After clicking the “Client Exit” button on step 2, you will see an Exit Client form similar to this:

Exit Client

Basic Information:

Name	Phone
First Name <input type="text" value="John"/>	<input type="text"/>
Middle Name <input type="text" value="Middle Name"/>	Email <input type="text" value="you@example.com"/>
Last Name <input type="text" value="Doe"/>	Birthdate <input type="text"/> 

Address

Street

City State/Province

Step 3. After filling out the Client Exit form, click the Next button:

SALESFORCE SCREEN ENTRY: CLIENT EXIT

After clicking "Next" in step 3 you process for completing a Client Exit is finished:

Exit Client

All Done!
Click the "Finish" button to exit!

Previous

Finish

.CSV DATA TRANSFER: IMPORT SPECIFICATIONS

Below are the technical specifications for importing Client Intake, Exit, and Monthly Participation data using .csv files. There are three columns to each file specification: The names of the column headers, the field types, and list of restricted values (if any).

Client Intake File

Subcontractor	Constant	{!Record.Id}
Client ID	Text/String	
District	Picklist	1-12
Site	Picklist	Alameda, Butte, Contra Costa, El Dorado, Fresno, Humboldt, Inyo, Kern, Kings, Lassen, Los Angeles, Madera, Mendocino, Merced, Monterey, Napa, Orange, Placer, Riverside, Sacramento, San Benito, San Bernardino, San Diego, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Solano, Sonoma, Stanislaus, Tulare, Ventura, Yolo, Yuba
First Name	Text/String	
Middle Initial	Text/String	
Last Name	Text/String	
Mailing Address	Text/String	
Mailing City	Text/String	
Mailing State	Picklist	(US States)
Mailing Zip/Postal Code	Text/String	
Phone	Phone	
Email	Email	
Birthdate	Date	
Gender	Picklist	Male, Female, Non-Binary, Declined
Start Date	Date	
Primary Race	Picklist	African American, "American Indian, Alaska Native or Indigenous", Asian, Caucasian, Hispanic, Native Hawaiian or Other Pacific Islander, Other, Declined, Unknown/Not Known
Hispanic, Latino, or Spanish Origin?	Picklist	Yes, No, Not Collected
Living Situation	Picklist	Own House/Apt, Rent House/Apt, Public/Low-Income Housing, Staying with Family/Friends, Sober Living/Transitional Housing/Rapid Re-Housing, Homeless, Other, Unknown/Don't Know, Declined, Shelter, RV/Vehicle
Parole/Probation	Picklist (Multi-Select)*	County Probation; State Parole; Federal Supervision; Justice-Involved Not On Supervision; Non-Criminal Justice
Veteran?	Picklist	Yes, No, Not Collected
Foster Care?	Picklist	Yes, No, Not Collected
Highest Education Completed	Picklist	Less than High School Diploma, High School Diploma/GED, Some College/No Degree, Vocational/Technical Certificate, AA Degree, Bachelor's Degree, Master's Degree/PhD, Unknown/Don't Know, Declined
Media Release	Picklist	Yes, No, Not Collected
Referred By	Text/String	

* Values in a Multi-Select Picklist separated by a semi-colon (;)

.CSV DATA TRANSFER: IMPORT SPECIFICATIONS

Client Monthly Participation File

Subcontractor	Constant	{!Record.Id}
Client ID	Text/String	
Last Name	Text/String	
Contract	Picklist	CDCR, Clean California, Caltrans
District	Picklist	1-12
Site	Picklist	Alameda, Butte, Contra Costa, El Dorado, Fresno, Humboldt, Inyo, Kern, Kings, Lassen, Los Angeles, Madera, Mendocino, Merced, Monterey, Napa, Orange, Placer, Riverside, Sacramento, San Benito, San Bernardino, San Diego, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Solano, Sonoma, Stanislaus, Tulare, Ventura, Yolo, Yuba
Year	Text/String	
Month	Number	

***All Monthly Participation records must have a corresponding Client Intake record uploaded prior.**

.CSV DATA TRANSFER: IMPORT SPECIFICATIONS

Client Exit File

Subcontractor	Constant	{!Record.Id}
Client ID	Text/String	
District	Picklist	1-12
Site	Picklist	Alameda, Butte, Contra Costa, El Dorado, Fresno, Humboldt, Inyo, Kern, Kings, Lassen, Los Angeles, Madera, Mendocino, Merced, Monterey, Napa, Orange, Placer, Riverside, Sacramento, San Benito, San Bernardino, San Diego, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Solano, Sonoma, Stanislaus, Tulare, Ventura, Yolo, Yuba
First Name	Text/String	
Middle Initial	Text/String	
Last Name	Text/String	
Mailing Address	Text/String	
Mailing City	Text/String	
Mailing State	Picklist	(US States)
Mailing Zip/Postal Code	Text/String	
Phone	Phone	
Email	Email	
End Date	Date	
Exit Reason	Picklist	Employment, Education, Health/Medical/Family/Death, Justice Request, Program Completion, Recidivism, Substance Abuse, Termination for Cause, Voluntary Resignation/Quit/No Show, Other
Exit Reason (Other)	Text/String	
Exit Wages (Hourly)	Currency	
Exit Employment Status	Picklist	Unemployed, Student, Temporary, Part Time, Seasonal, Full Time
Exit Industry	Text/String	
Caltrans Hire?	Picklist	Yes, No, Not Collected
Caltrans Position	Text/String	
Benefits?	Picklist	Yes, No, Not Collected

***All Client Exit records must have a corresponding Client Intake record uploaded prior.**

.CSV DATA TRANSFER: CROSSWALK TOOL

In order to consolidate various Subcontractor data values a website was developed to provide a tool to crosswalk values to a common denominator. It is certainly not required for Subcontractors to use, but available if useful to Subcontractors.

Step 1. Open a web browser to b2wdata.org.

After navigating a web browser to b2wdata.org in step 1, the Back2Work Client Data page will look similar to this:



Operations and Safety

[B2W Incident Report Form & Process](#)
[Caltrans Code of Safe Operating Practices](#)
[Caltrans Covid Guidance](#)
[Caltrans Encampments Guidance](#)
[Caltrans Encroachment Permit](#)
[Caltrans Excessive Heat Guidance](#)
[Caltrans Maintenance Chapters](#)
[Caltrans Safety Report - JHA Forms](#)
[Caltrans Wildfire Smoke Guidance](#)
[3-1-2022 Roadside Safety Training.pptx](#)

Client Data

[Salesforce](#)
[.csv Crosswalk Tool](#)
[Database User Manual](#)

We are always here to provide assistance at b2wdata@bcoe.org!



.CSV DATA TRANSFER: CROSSWALK TOOL

Step 2. Click on the link to the “.csv Crosswalk Tool”:



Operations and Safety

[B2W Incident Report Form & Process](#)
[Caltrans Code of Safe Operating Practices](#)
[Caltrans Covid Guidance](#)
[Caltrans Encampments Guidance](#)
[Caltrans Encroachment Permit](#)
[Caltrans Excessive Heat Guidance](#)
[Caltrans Maintenance Chapters](#)
[Caltrans Safety Report - JHA Forms](#)
[Caltrans Wildfire Smoke Guidance](#)
[3-1-2022 Roadside Safety Training.pptx](#)

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.CSV DATA TRANSFER: CROSSWALK TOOL

After clicking on “.csv Crosswalk Tool” in step 2, the Crosswalk Tool will look similar to this:

CSV Crosswalk Tool



Column	Back2Work Value	Subcontractor Value
-- Select --		

Step 3. Click the “Choose CSV File” button at the bottom to upload a .csv file:

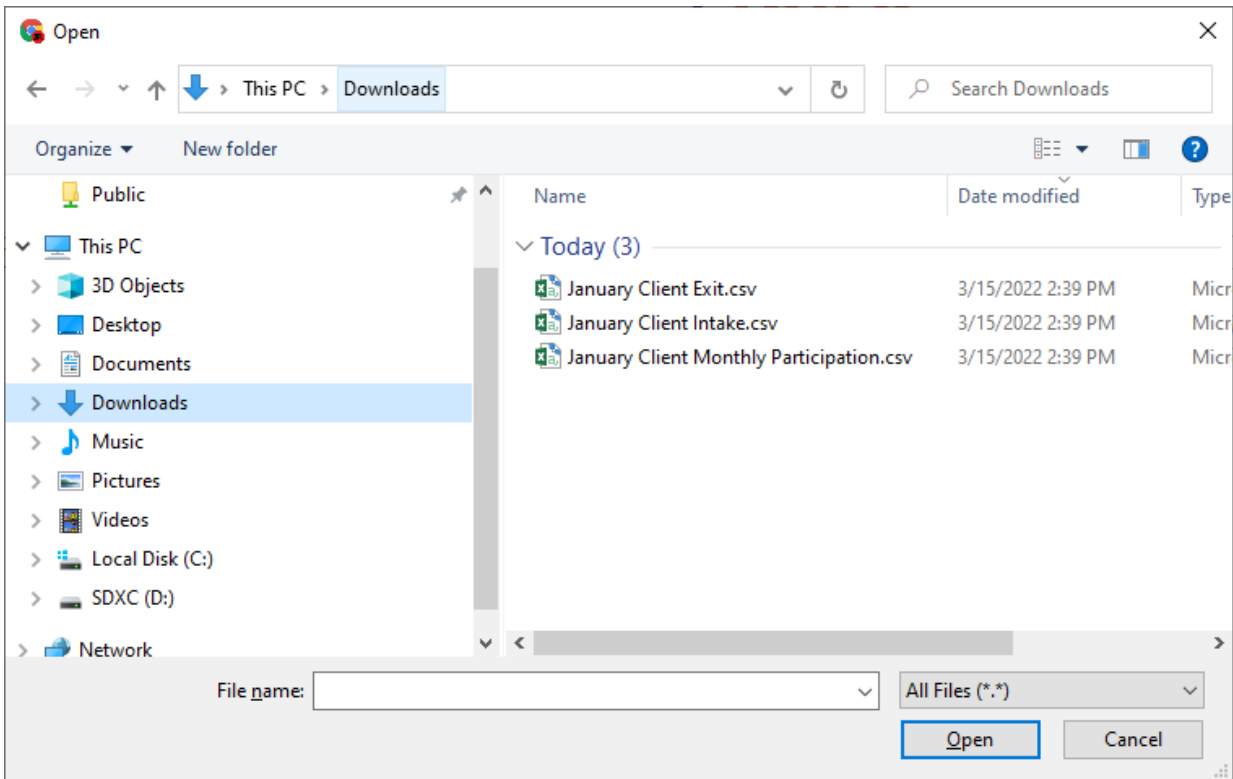
CSV Crosswalk Tool



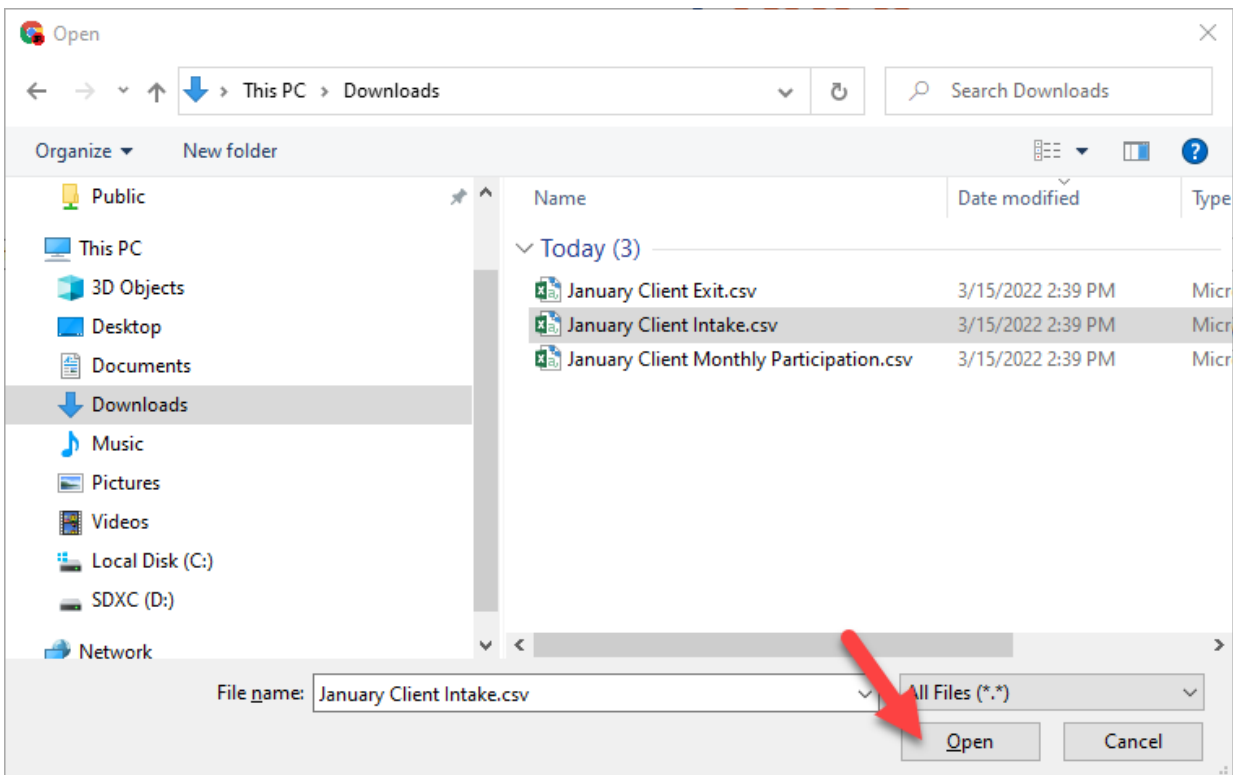
Column	Back2Work Value	Subcontractor Value
-- Select --		

.CSV DATA TRANSFER: CROSSWALK TOOL

After clicking on the “Choose File” button in step 3, you will have a file dialogue box similar to this:



Step 4. Select a .csv file and then click “Open”:



.CSV DATA TRANSFER: CROSSWALK TOOL

After clicking on the “Open” button in step 4, you will return to the Crosswalk Tool:

CSV Crosswalk Tool



Column	Back2Work Value	Subcontractor Value
-- Select --		

Step 5. Click the “Load CSV File” button:

CSV Crosswalk Tool



Column	Back2Work Value	Subcontractor Value
-- Select --		

After clicking the “Load CSV File” button in step 5, the data in the .csv file will be provided in a table below the load buttons.

.CSV DATA TRANSFER: CROSSWALK TOOL

Step 6. Select a Column or Column Heading, select a Back2Work Value, and enter Subcontractor Value text that needs updating:

CSV Crosswalk Tool



Column	Back2Work Value	Subcontractor Value
-- Select --		

The example below is converting the Subcontractor value “White” to the Back2Work Value “Caucasian” for the Column Primary Race:

CSV Crosswalk Tool




Column	Back2Work Value	Subcontractor Value
Primary Race	Caucasian	White

.CSV DATA TRANSFER: CROSSWALK TOOL

Step 7. After selecting a Column, Back2Work Value, and Subcontractor Value in step 6, click the “ADD LINE” button.

CSV Crosswalk Tool



Column Back2Work Value Subcontractor Value

Primary Race Caucasian White

ADD LINE DELETE LINE


Choose CSV File Load CSV File Convert and Export to CSV

Choose Settings File Load Settings File Export Settings File

A red arrow points to the ADD LINE button.

After clicking the “ADD LINE” button in step 7, you should have a second row to enter values into similar to this:

CSV Crosswalk Tool



Column Back2Work Value Subcontractor Value

Primary Race Caucasian White

ADD LINE DELETE LINE

Choose CSV File Load CSV File Convert and Export to CSV

Choose Settings File Load Settings File Export Settings File

A red arrow points to the ADD LINE button.

Step 8. Repeat steps 6 and 7 until all necessary values have been setup in the crosswalk.

.CSV DATA TRANSFER: CROSSWALK TOOL


Step 9. After completing setup of your crosswalk in step 8, click the “Convert and Export to CSV” button:

CSV Crosswalk Tool



Column	Back2Work Value	Subcontractor Value
Primary Race	Caucasian	White
-- Select --		

After clicking the “Convert and Export to CSV” button in step 9, your file is now ready and usually can be found in the bottom-left corner of your browser with the file name “table-export.csv”:

 table-export.csv

Step 10. Repeat steps 3-10 for each of the three .csv files as necessary including data for Client Intakes, Exits, and Monthly Participation.

.CSV DATA TRANSFER: CROSSWALK TOOL

Step 11. After adding as many rows to the crosswalk tool as needed to convert your csv files, you can save the crosswalk settings by clicking the “Export Settings File” button:


CSV Crosswalk Tool



Column	Back2Work Value	Subcontractor Value
Primary Race	Caucasian	White
-- Select --		

ADD LINE DELETE LINE

After clicking the “Export Settings File” button in step 11, your file is now ready and usually can be found in the bottom-left corner of your browser with the file name “settings.csv”:

 settings.csv

Step 12. In subsequent use of this crosswalk tool you can load the settings.csv file using steps similar to steps 3, 4, and 5 by instead clicking the “Choose Settings File” and “Load Settings File” buttons.

CSV Crosswalk Tool

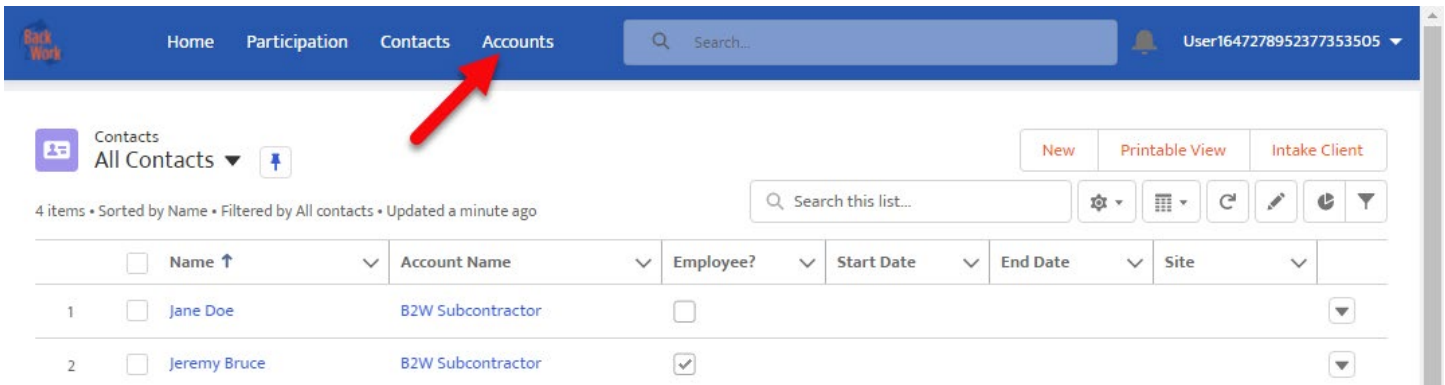


Column	Back2Work Value	Subcontractor Value
Primary Race	Caucasian	White

ADD LINE DELETE LINE

.CSV DATA TRANSFER: SALESFORCE .CSV UPLOAD

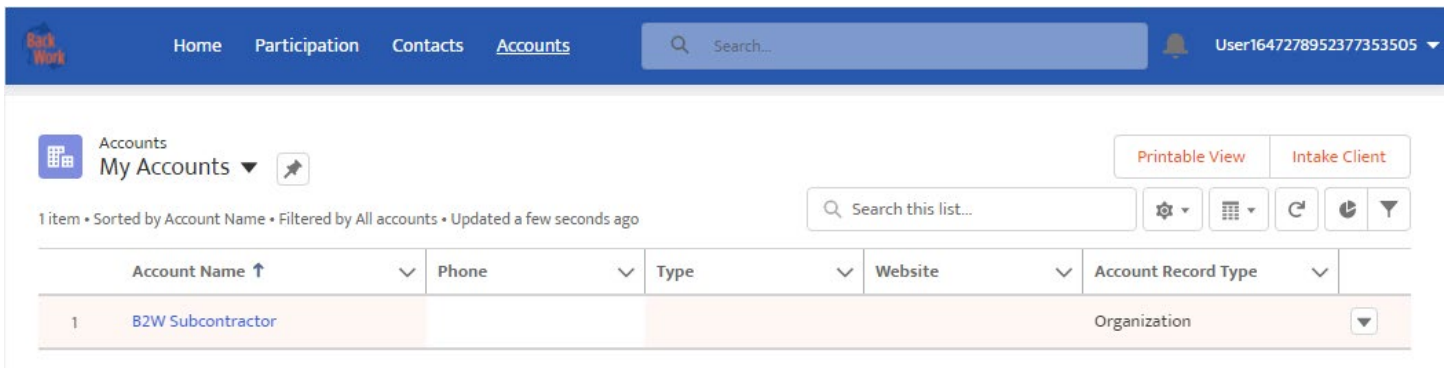
Step 1. After logging into Salesforce, click on the “Accounts” tab.



The screenshot shows the Salesforce interface. The navigation bar at the top includes 'Home', 'Participation', 'Contacts', and 'Accounts'. A red arrow points to the 'Accounts' tab. Below the navigation bar, the 'Contacts' section is active, showing 'All Contacts' with a search bar and several action buttons: 'New', 'Printable View', and 'Intake Client'. A table lists 4 items, sorted by Name. The table has columns for Name, Account Name, Employee?, Start Date, End Date, and Site.

	Name ↑	Account Name	Employee?	Start Date	End Date	Site
1	Jane Doe	B2W Subcontractor	<input type="checkbox"/>			
2	Jeremy Bruce	B2W Subcontractor	<input checked="" type="checkbox"/>			

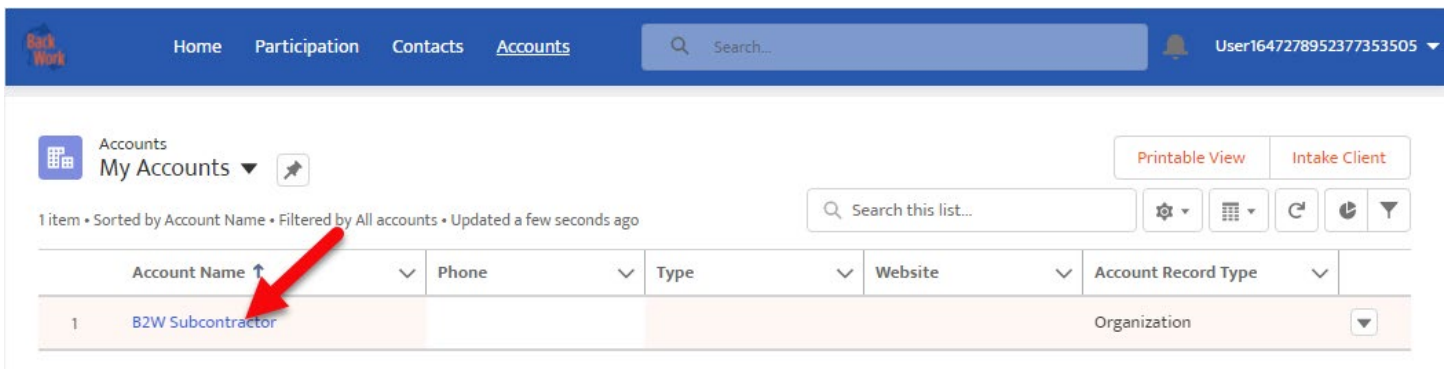
After clicking on the “Accounts” tab in step 1, you will see the “My Accounts” screen similar to this:



The screenshot shows the Salesforce interface with the 'Accounts' tab selected in the navigation bar. The 'My Accounts' section is active, showing a search bar and action buttons: 'Printable View' and 'Intake Client'. A table lists 1 item, sorted by Account Name. The table has columns for Account Name, Phone, Type, Website, and Account Record Type.

	Account Name ↑	Phone	Type	Website	Account Record Type
1	B2W Subcontractor				Organization

Step 2. Click on your Organization Name:



The screenshot shows the Salesforce interface with the 'Accounts' tab selected in the navigation bar. The 'My Accounts' section is active, showing a search bar and action buttons: 'Printable View' and 'Intake Client'. A table lists 1 item, sorted by Account Name. A red arrow points to the 'B2W Subcontractor' organization name in the table.

	Account Name ↑	Phone	Type	Website	Account Record Type
1	B2W Subcontractor				Organization

.CSV DATA TRANSFER: SALESFORCE .CSV UPLOAD

After clicking on your Organization Name in step 2, you will see the upload screen similar to this:

The screenshot shows the Salesforce interface for the account 'B2W Subcontractor'. The top navigation bar includes 'Home', 'Participation', 'Contacts', and 'Accounts'. The account name 'B2W Subcontractor' is displayed, along with '+ Follow' and 'Intake Client' buttons. The 'Import' section on the right is titled 'b2wdata.org' and contains three main sections: 'Intake', 'Exit', and 'Monthly Participation'. Each section has an 'Import' button (labeled 'Intake Clients', 'Exit Clients', or 'Import Records') and a 'SimpleImport' link below it. On the left, the 'Related' section shows 'Related Contacts (3)' with a table listing John Doe, Jeremy Bruce, and Jane Doe. Below that is 'Account History (1)' with a table showing a record from 3/14/2022.

Contact Name	Employee?	Start Date	End Date
John Doe	<input type="checkbox"/>		
Jeremy Bruce	<input checked="" type="checkbox"/>		
Jane Doe	<input type="checkbox"/>		

Date	Field	User	Original Value	New Value
3/14/2022, 10:22 AM	Created.	Jeremy Bruce		

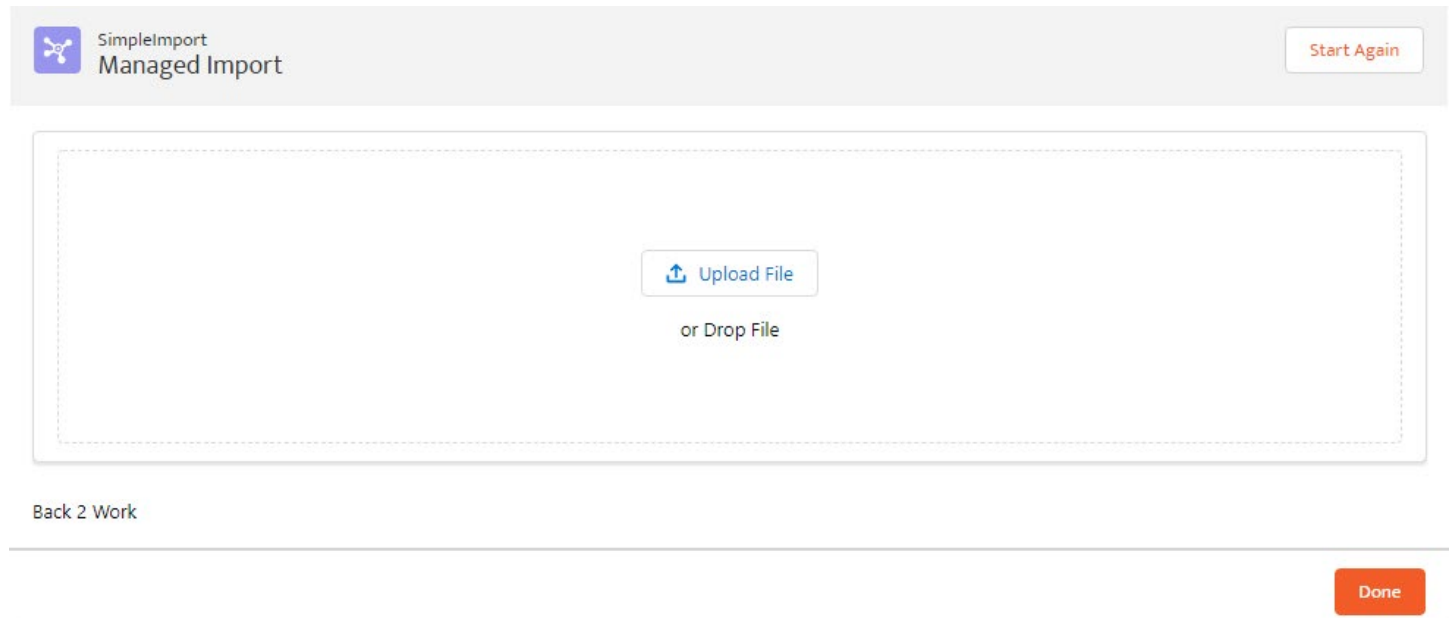
Step 3. Click on either the Intake, Monthly Participation, or Exit button to start the wizard to upload the corresponding .csv file

NOTE! Monthly Participation and Client Exit records must have a corresponding Client Intake record uploaded prior.

This screenshot is identical to the previous one, but with three red arrows pointing to the 'Intake Clients', 'Exit Clients', and 'Import Records' buttons in the 'Import' section, indicating the next step in the process.

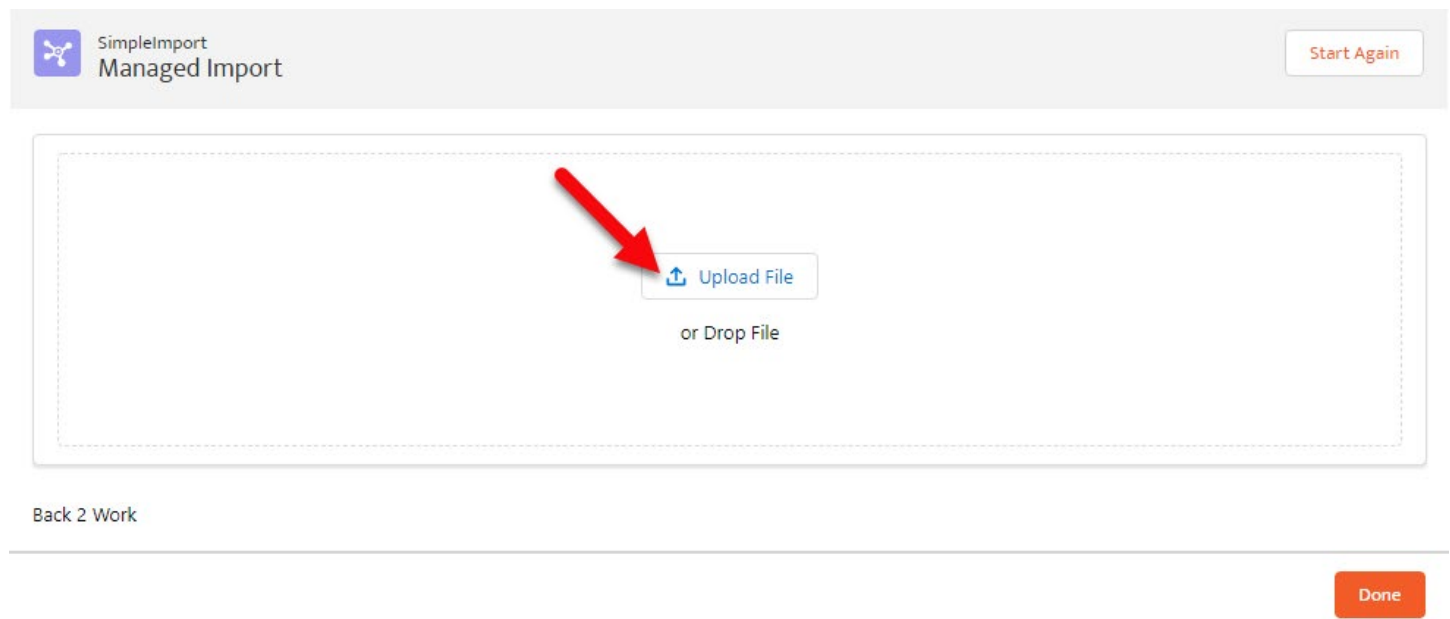
.CSV DATA TRANSFER: SALESFORCE .CSV UPLOAD

After clicking on an upload button in step 3 you will see the upload screen similar to this:



The screenshot shows the SimpleImport Managed Import interface. At the top left is the SimpleImport logo and the text "SimpleImport Managed Import". At the top right is a "Start Again" button. The main area is a large dashed box containing an "Upload File" button with an upward arrow icon and the text "or Drop File" below it. At the bottom left is a "Back 2 Work" link, and at the bottom right is a "Done" button.

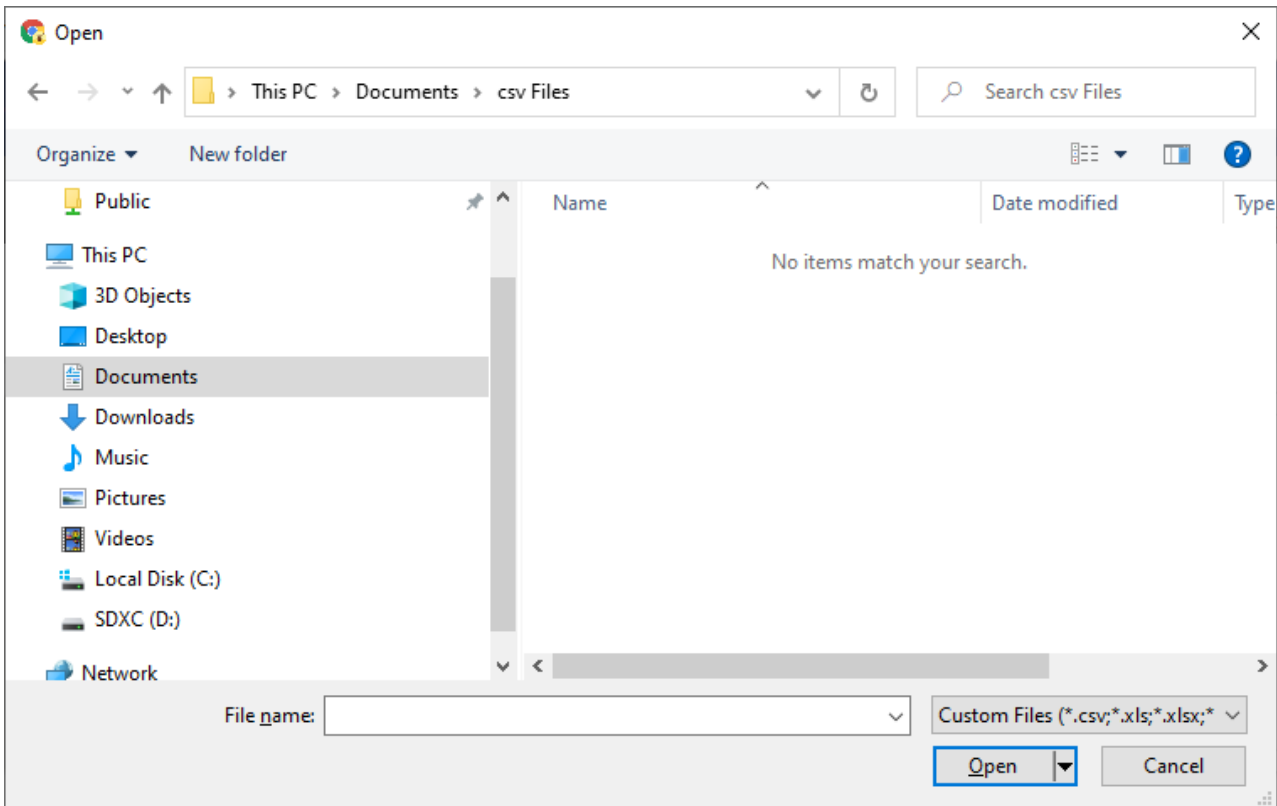
Step 4. Click the "Upload File" button:



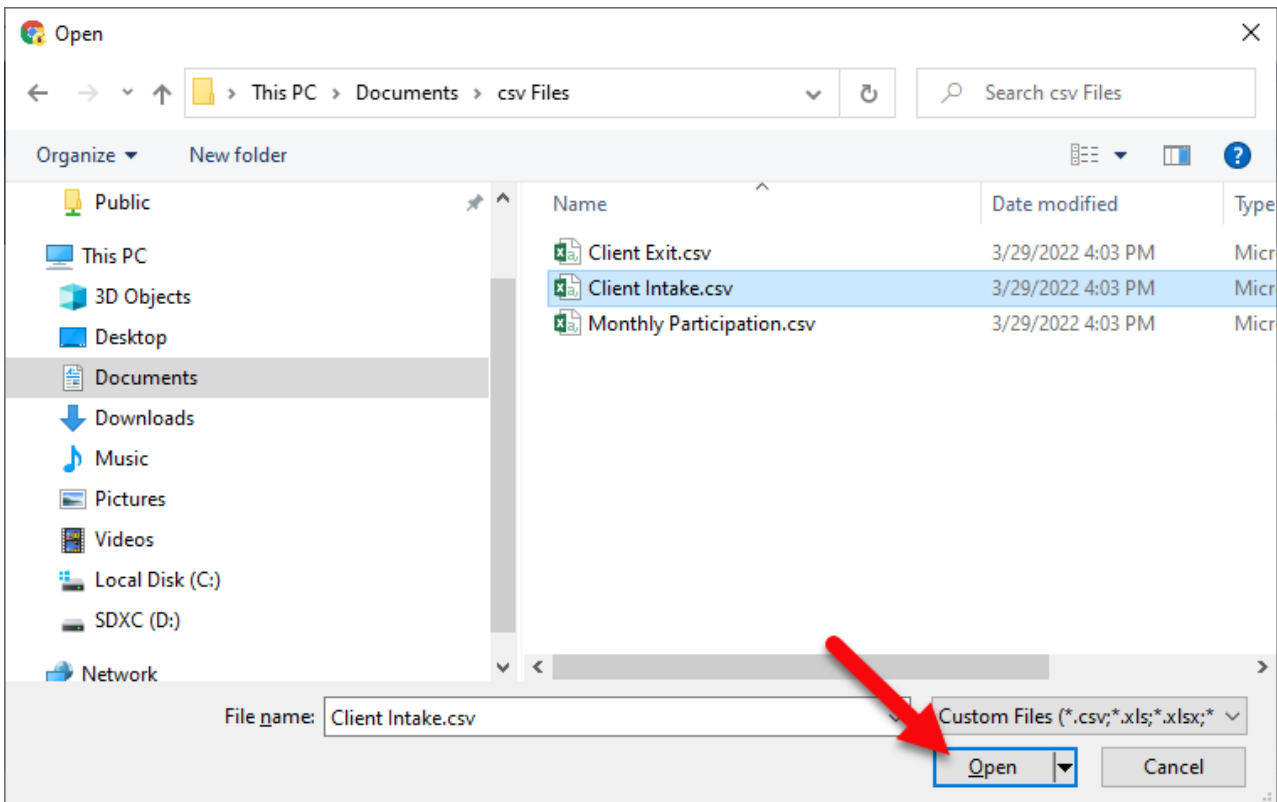
This screenshot is identical to the previous one, but a red arrow points directly to the "Upload File" button in the dashed box. The "Back 2 Work" link and "Done" button are also present.

.CSV DATA TRANSFER: SALESFORCE .CSV UPLOAD

After clicking on the “Upload File” button in step 4 you will see a file dialogue box similar to this:



Step 5. Find your corresponding Intake, Monthly Participation, or Exit .csv file to upload, then click “Open”:



.CSV DATA TRANSFER: SALESFORCE .CSV UPLOAD

After selecting a .csv file to upload in step 5, look to see if all records imported correctly.

Return to step 3 for remaining Intake, Monthly Participation, or Exit files that have yet to be uploaded.