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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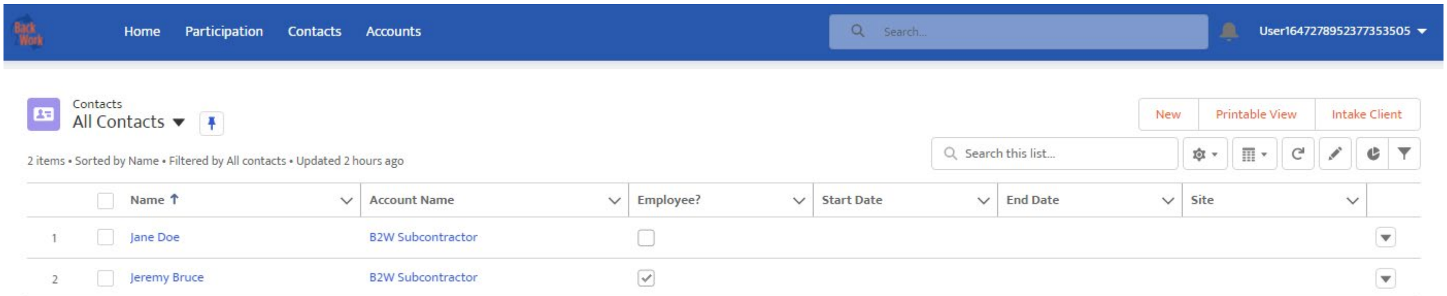
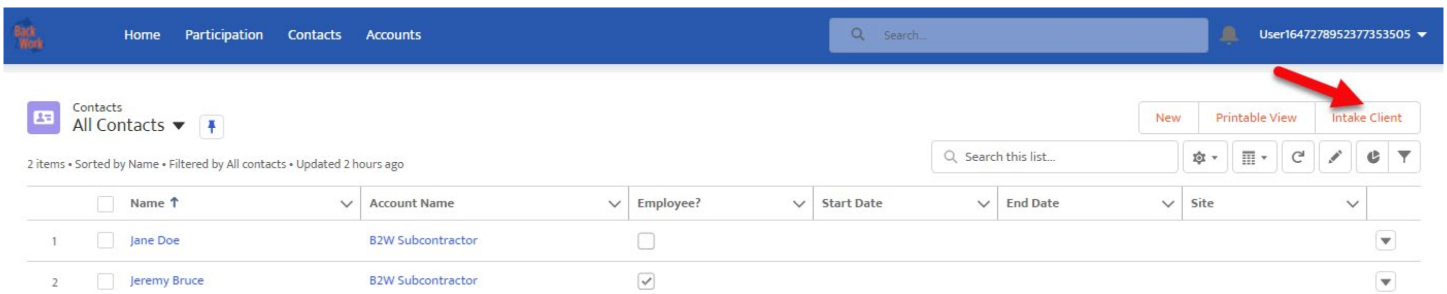
Salesforce Screen Entry: Client Intake

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.

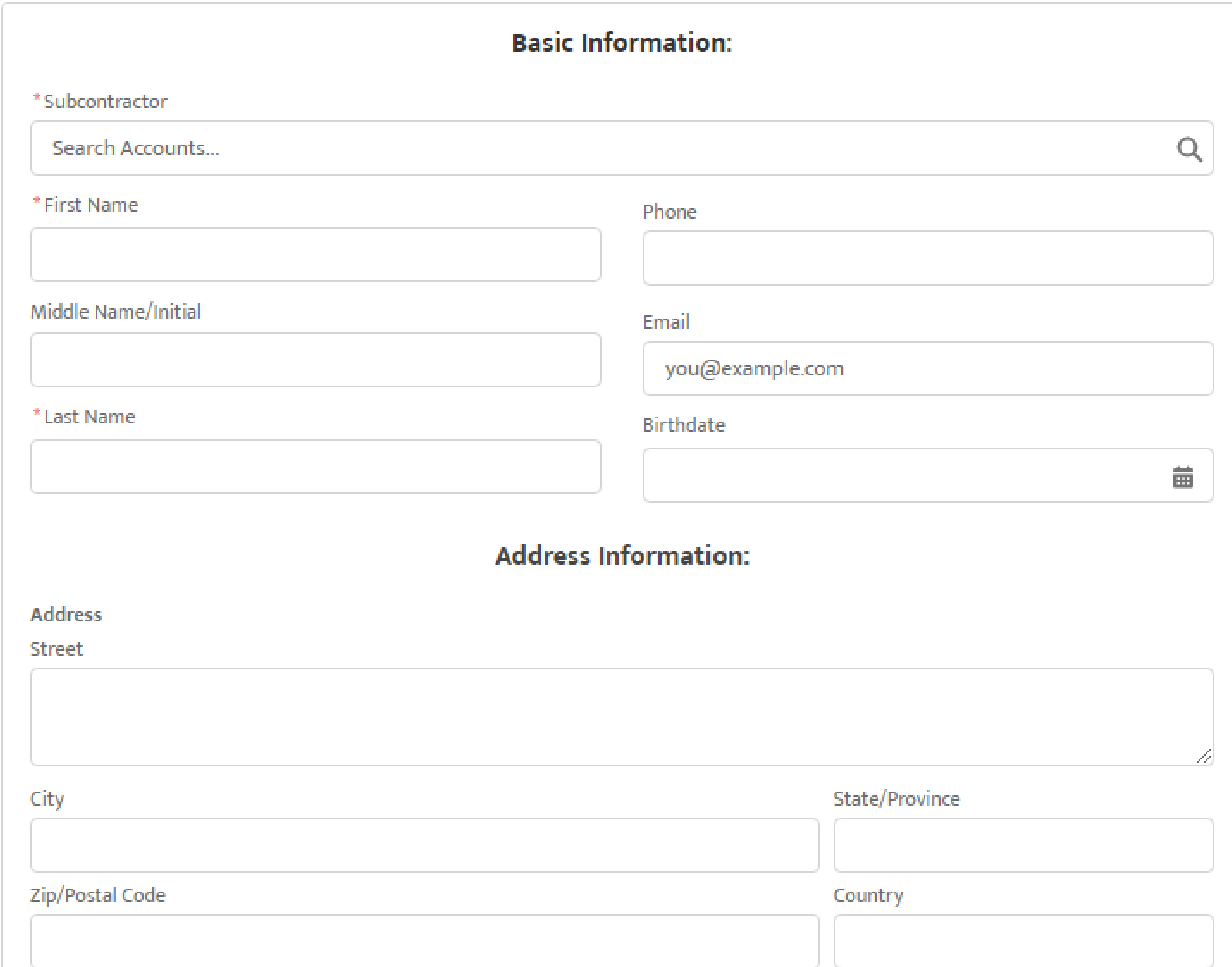


Step 1. From the home screen in Salesforce click the "Client Intake" button to begin entering this client information:



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

Search Accounts...

*First Name

Middle Name/Initial

*Last Name

Phone

Email

you@example.com

Birthdate

Address Information:

Address

Street

City

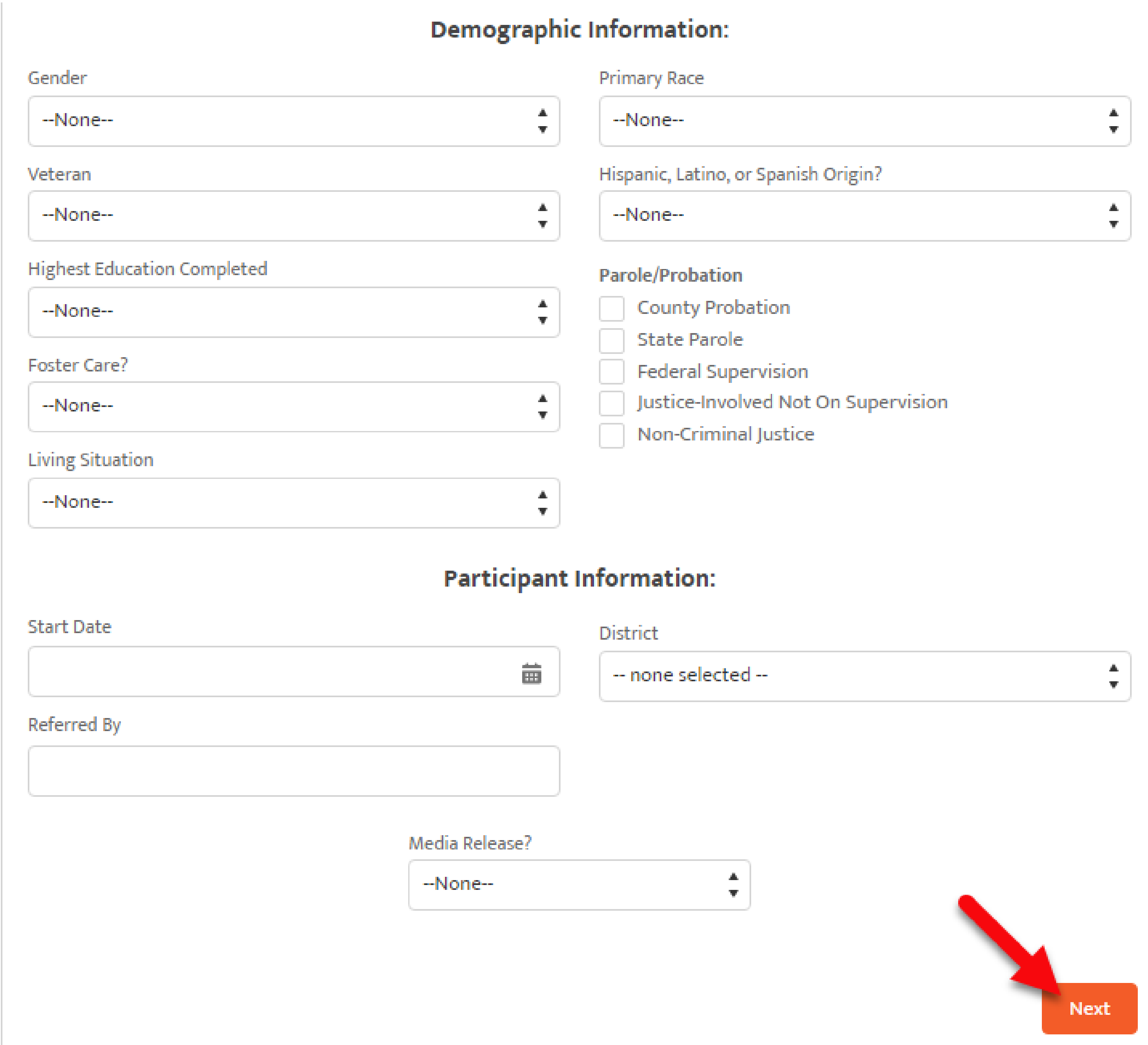
State/Province

Zip/Postal Code

Country

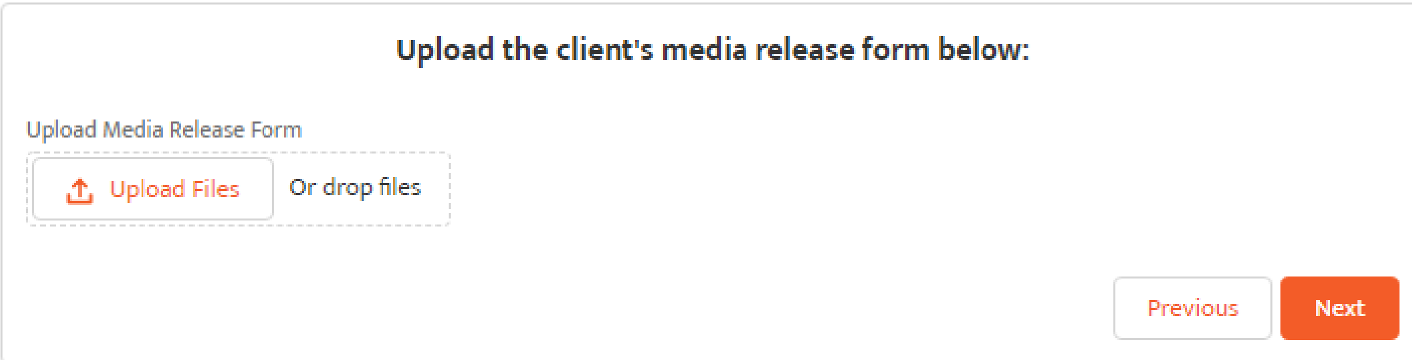
SALESFORCE SCREEN ENTRY: CLIENT INTAKE

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

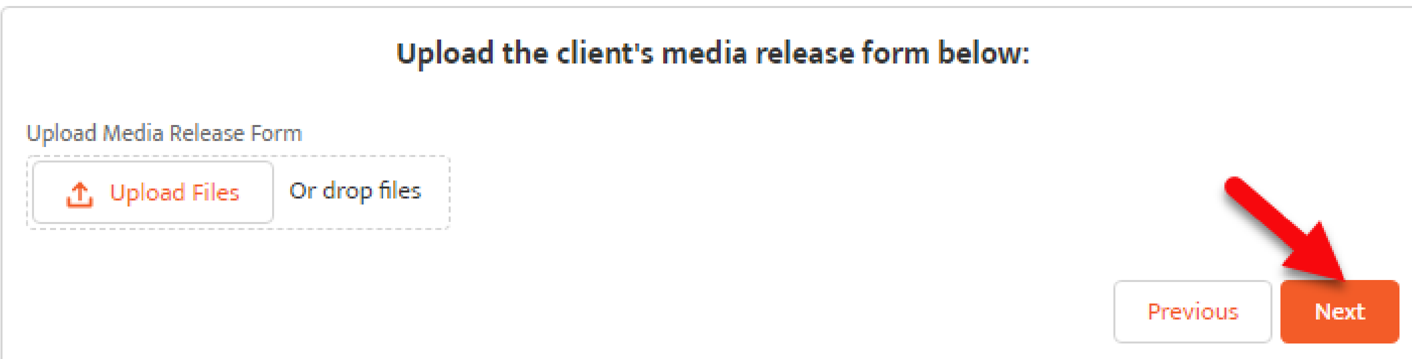


SALESFORCE SCREEN ENTRY: CLIENT INTAKE

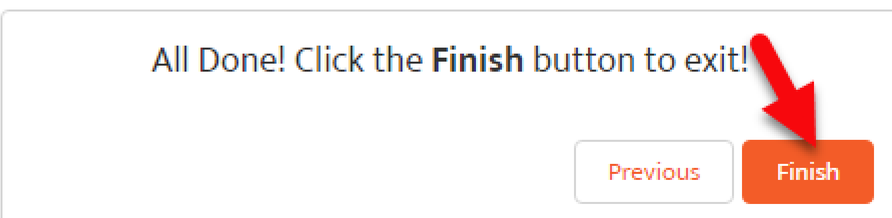
After clicking “Next” on the Client Intake form, you will have the opportunity to upload a signed Client Release form:



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

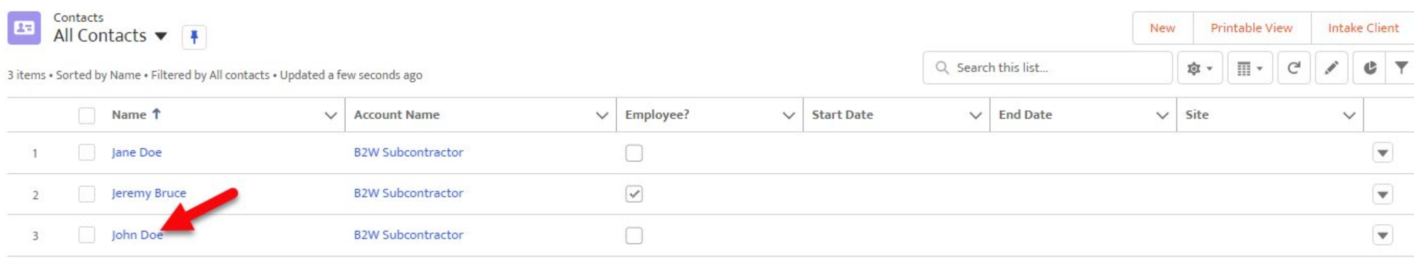


After attaching a Media Release form click the “Finish” button to complete the Client Intake.

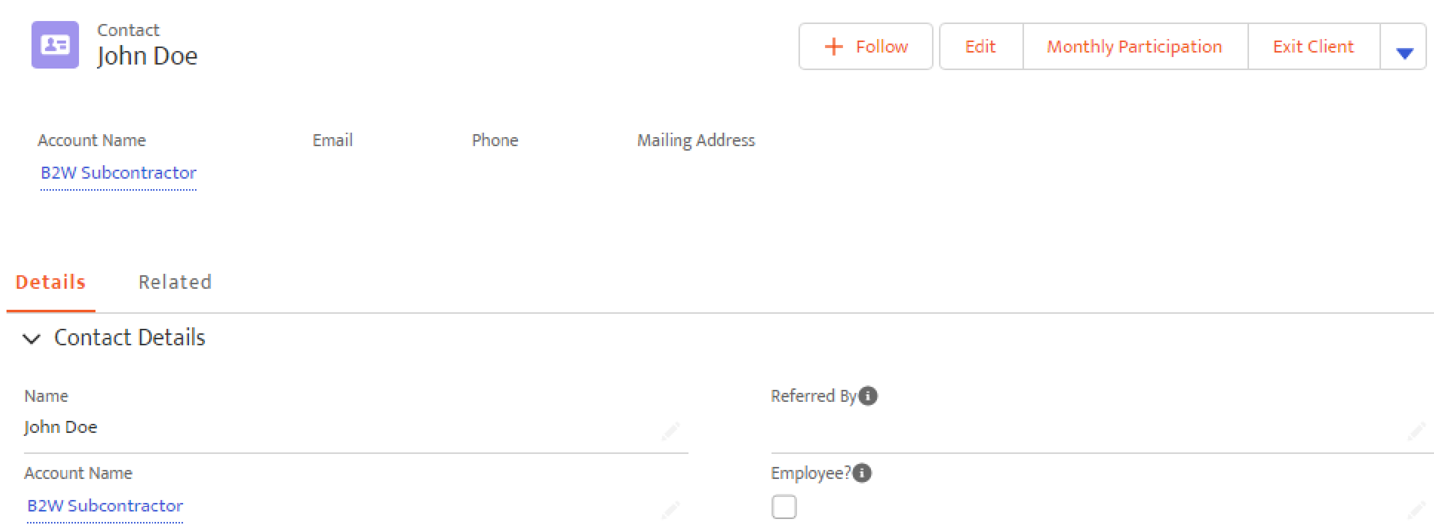


Salesforce Screen Entry: Monthly Participation

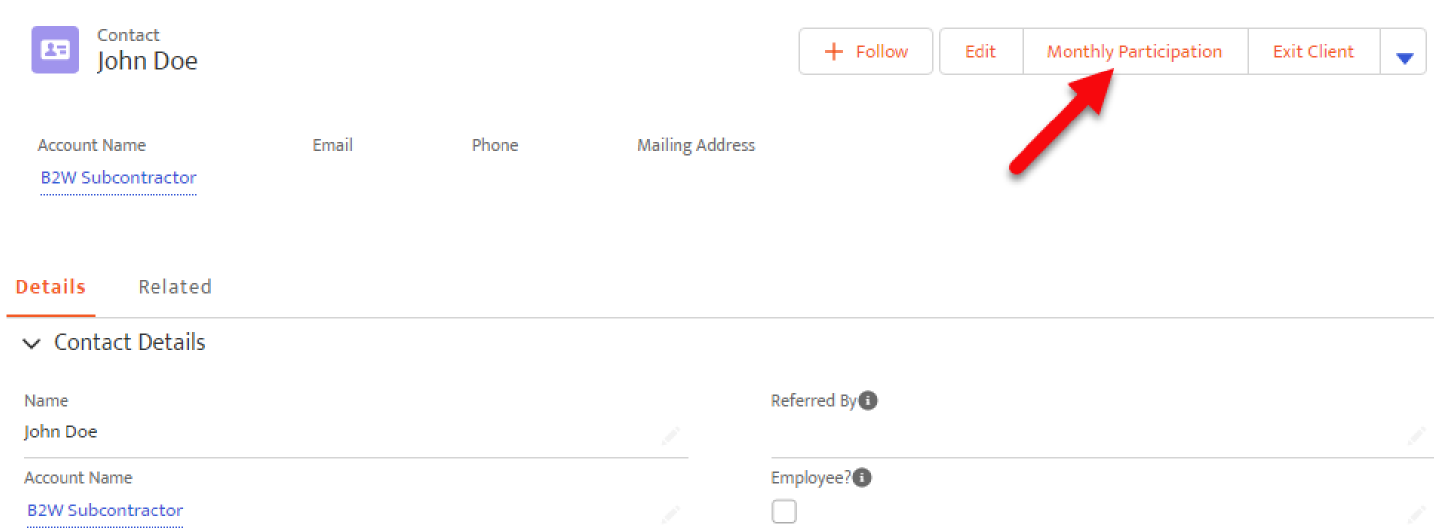
Step 1. From the Salesforce home screen select the client that has exited the program from the list of contacts:



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

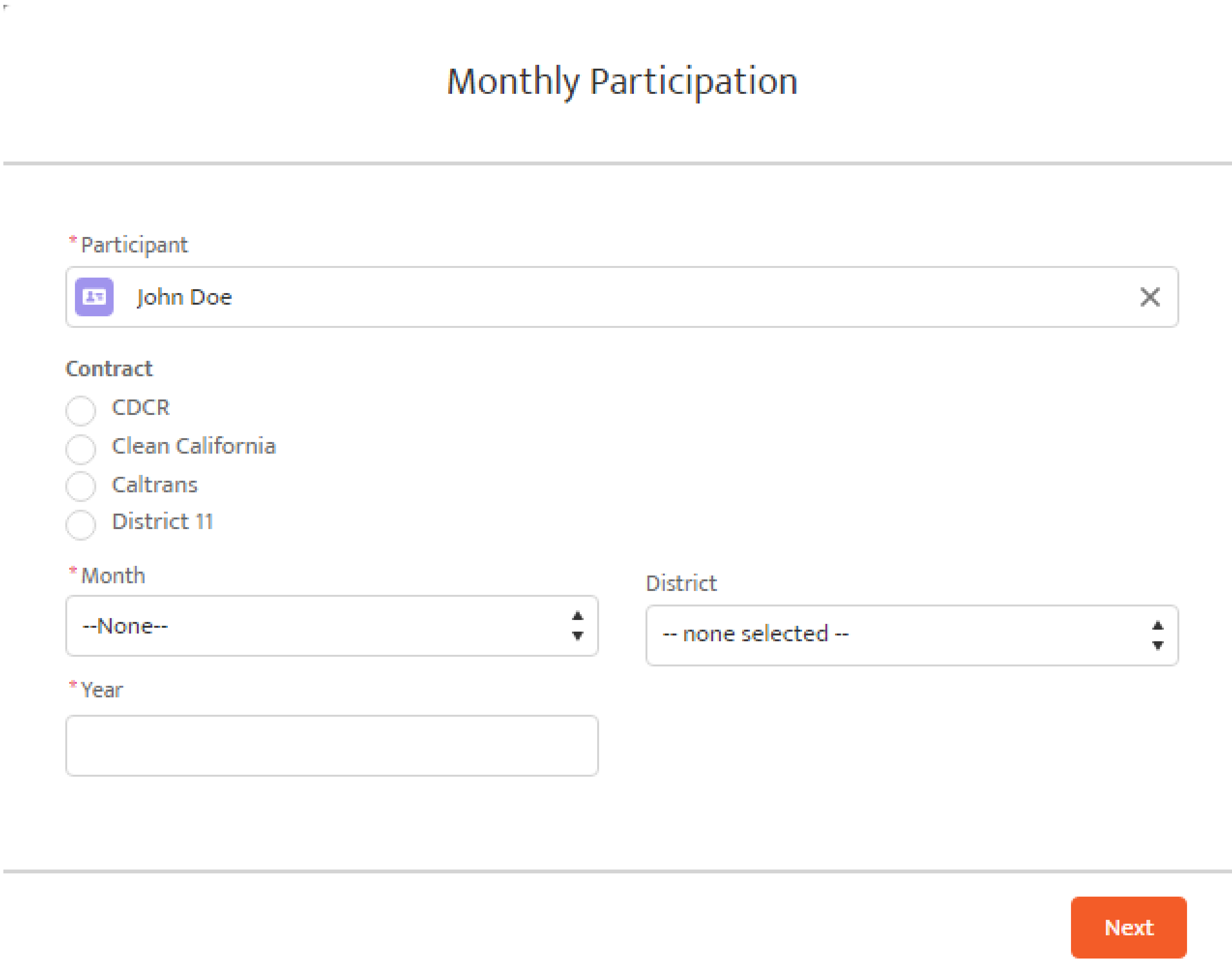


Step 2. Click the “Monthly Participation” button on the Contact Detail screen:



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

John Doe

Contract

CDCR

Clean California

Caltrans

District 11

*Month

--None--

District

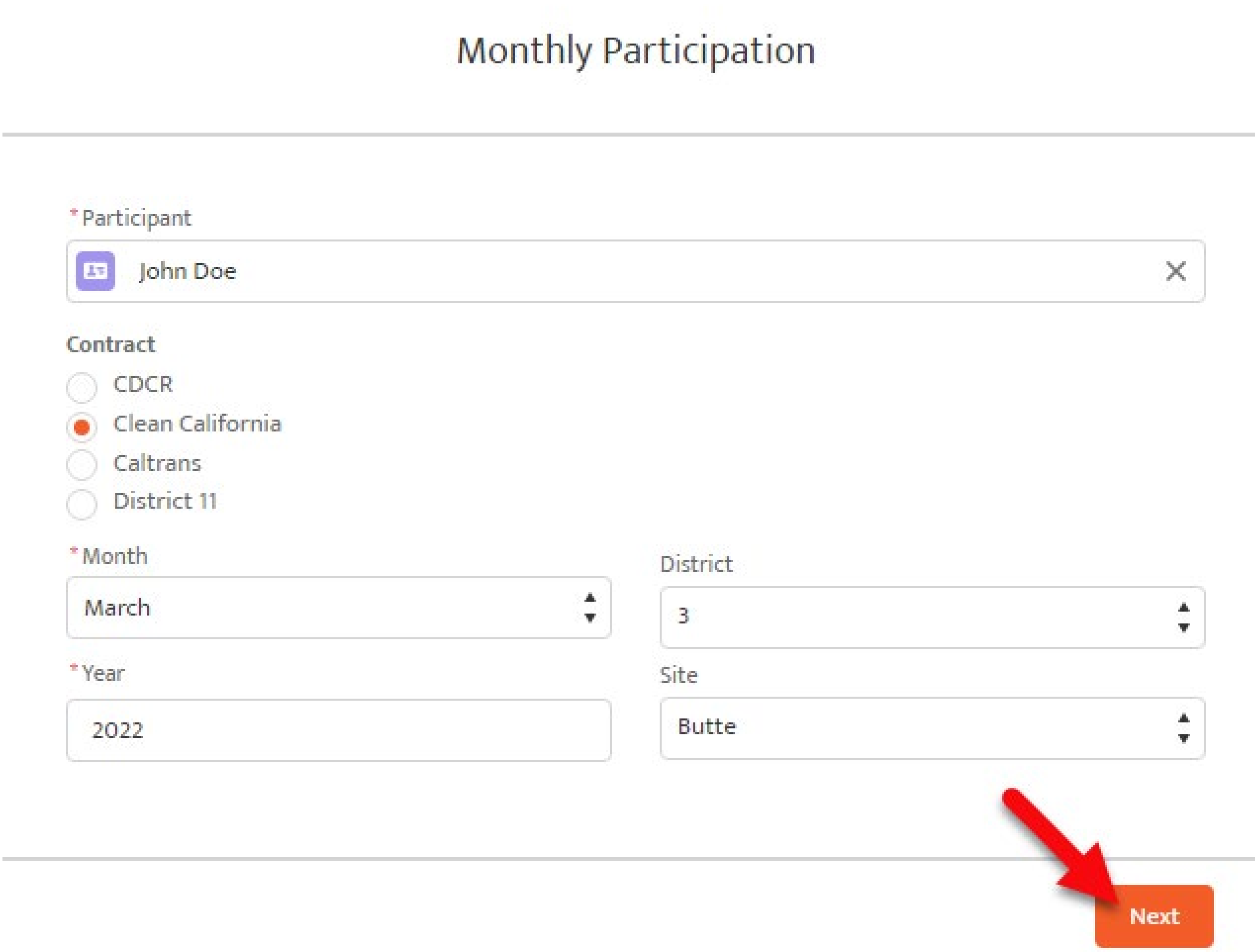
-- none selected --

*Year

Next

SALESFORCE SCREEN ENTRY: MONTHLY PARTICIPATION

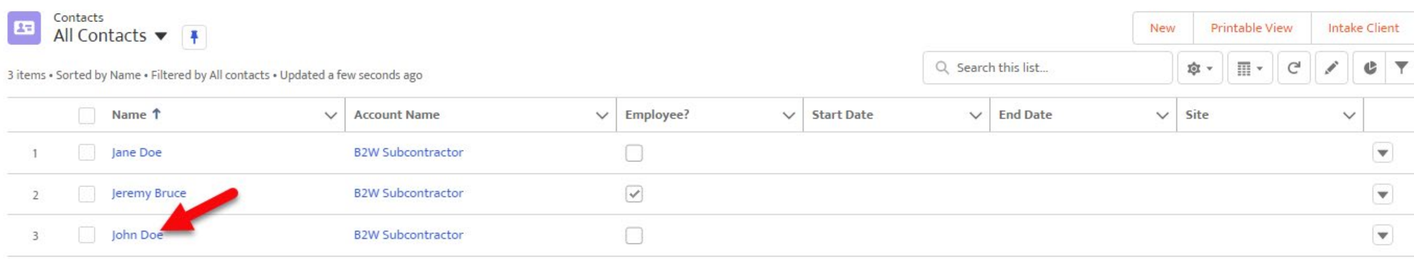
Step 3. Fill out the Contract, Month and Year of participation, District, and Site. Then click "Next":



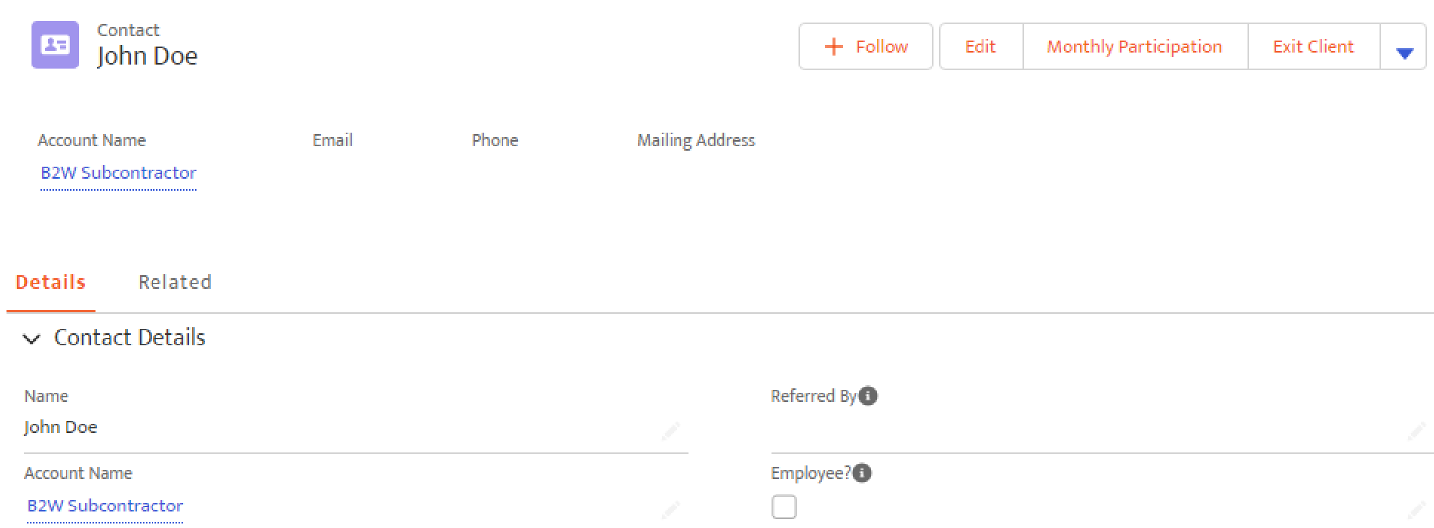
After clicking "Next" in step 3 you can either continue to add more Monthly Participation records or exit.

Salesforce Screen Entry: Client Exit

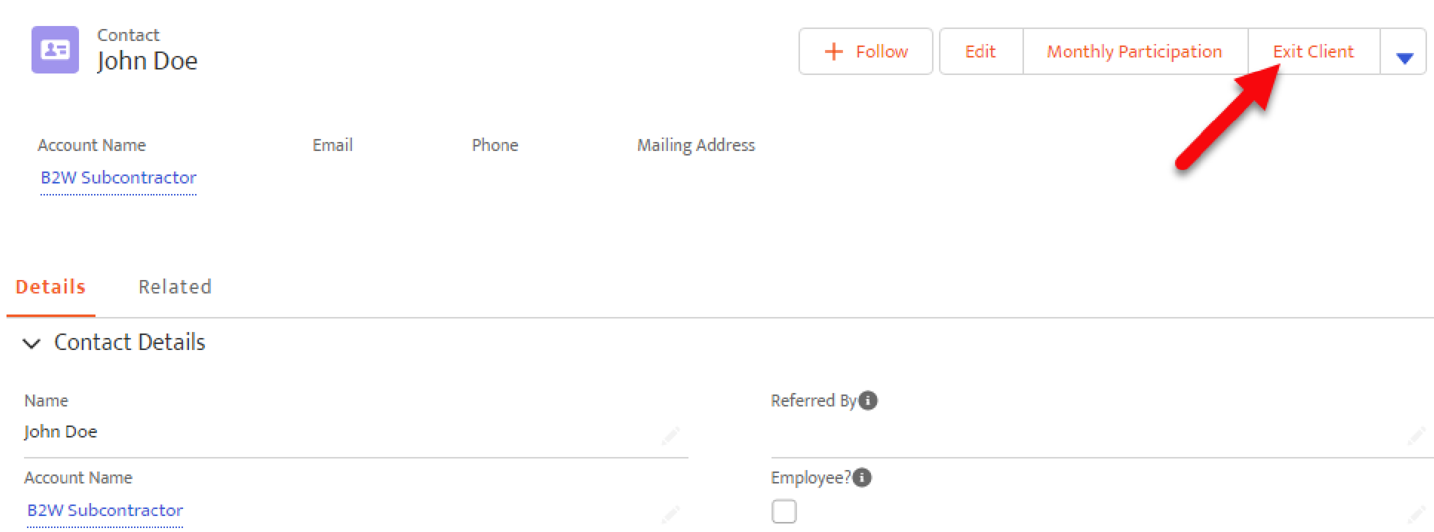
Step 1. From the Salesforce home screen select the client that has exited the program from the list of contacts:



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

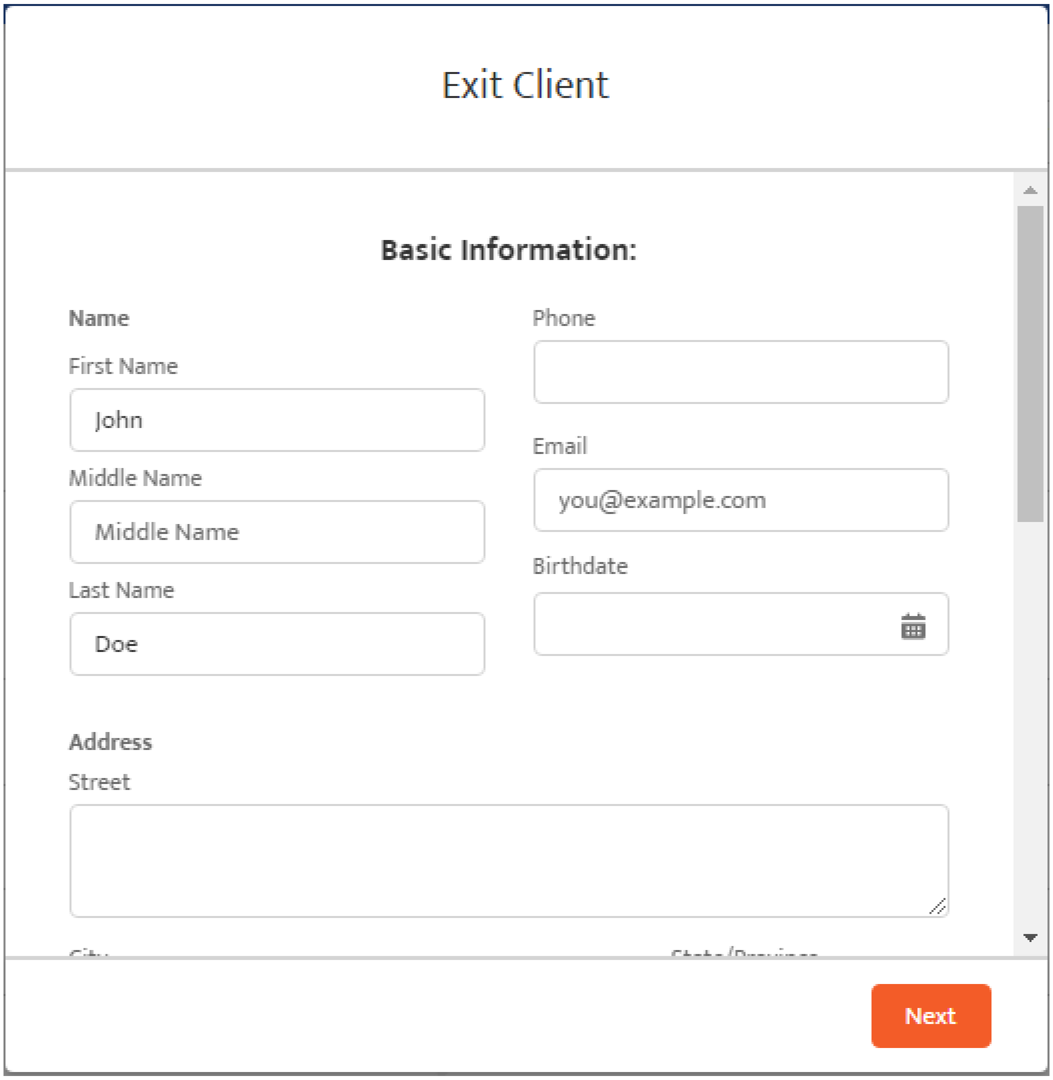


Step 2. Click the "Client Exit" button on the Contact Detail screen:



Salesforce Screen Entry: Client Exit

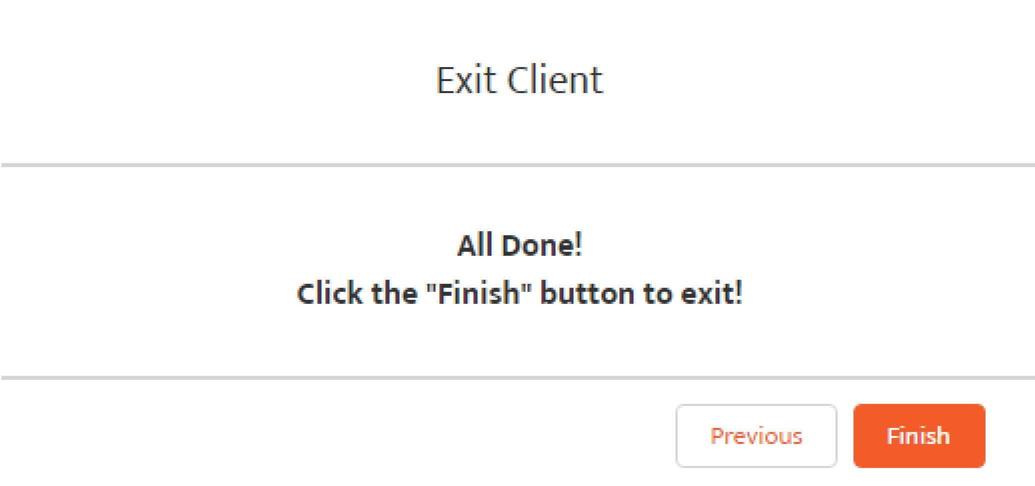
After clicking the “Client Exit” button on step 2, you will see an Exit Client form similar to this:



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:



.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

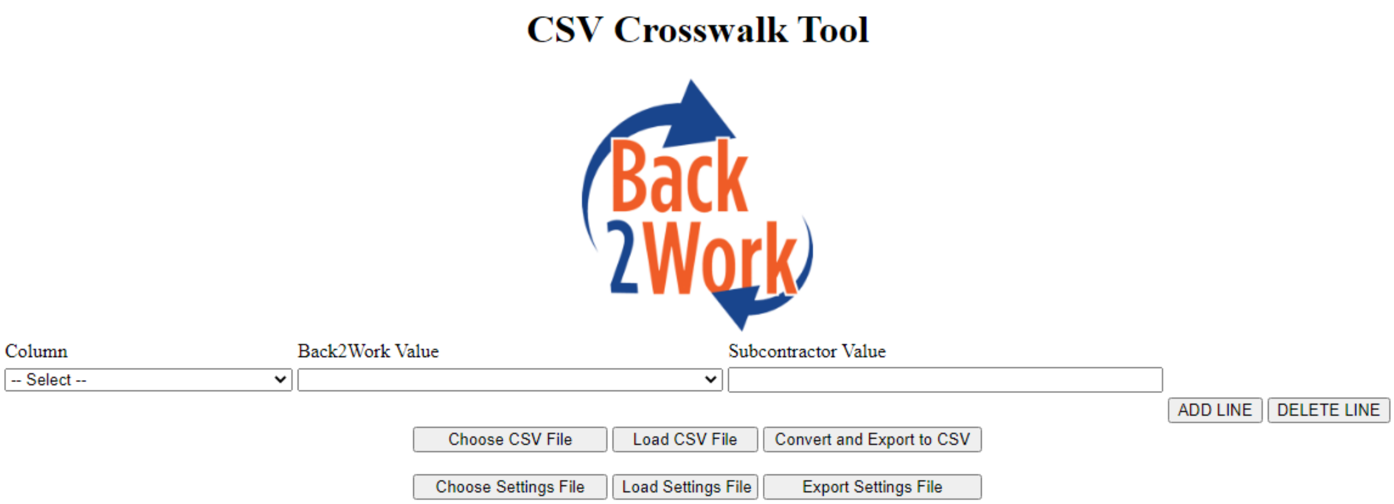
Client Data

Salesforce
.csv Crosswalk Tool
Database User Manual

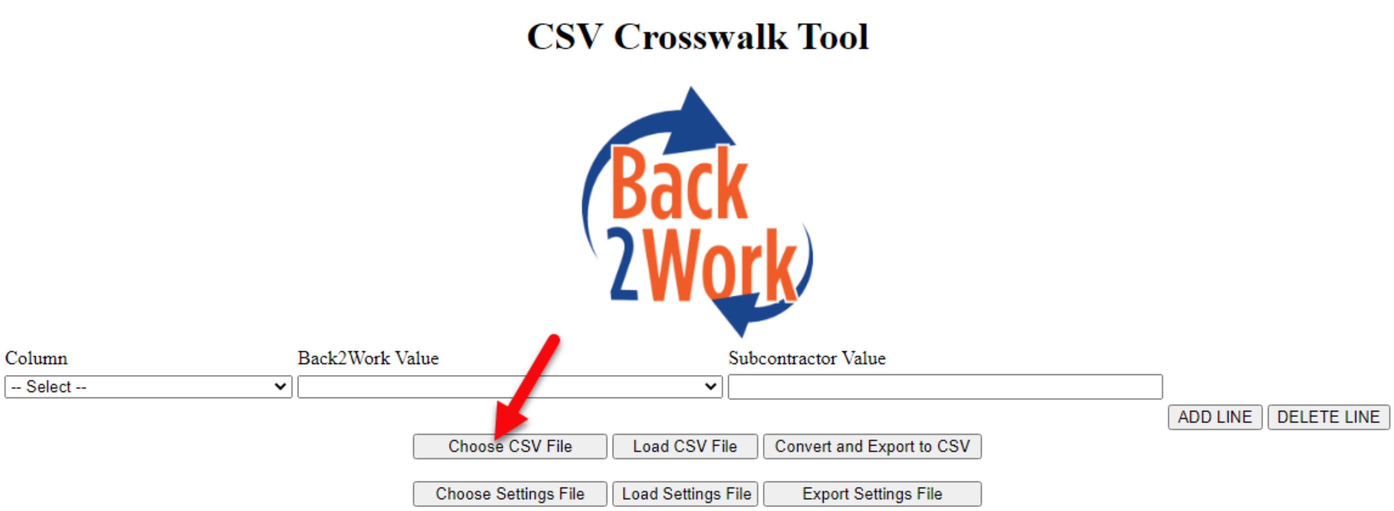
We are always here to provide assistance at b2wdata@bcoe.org!

.CSV DATA TRANSFER: CROSSWALK TOOL

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

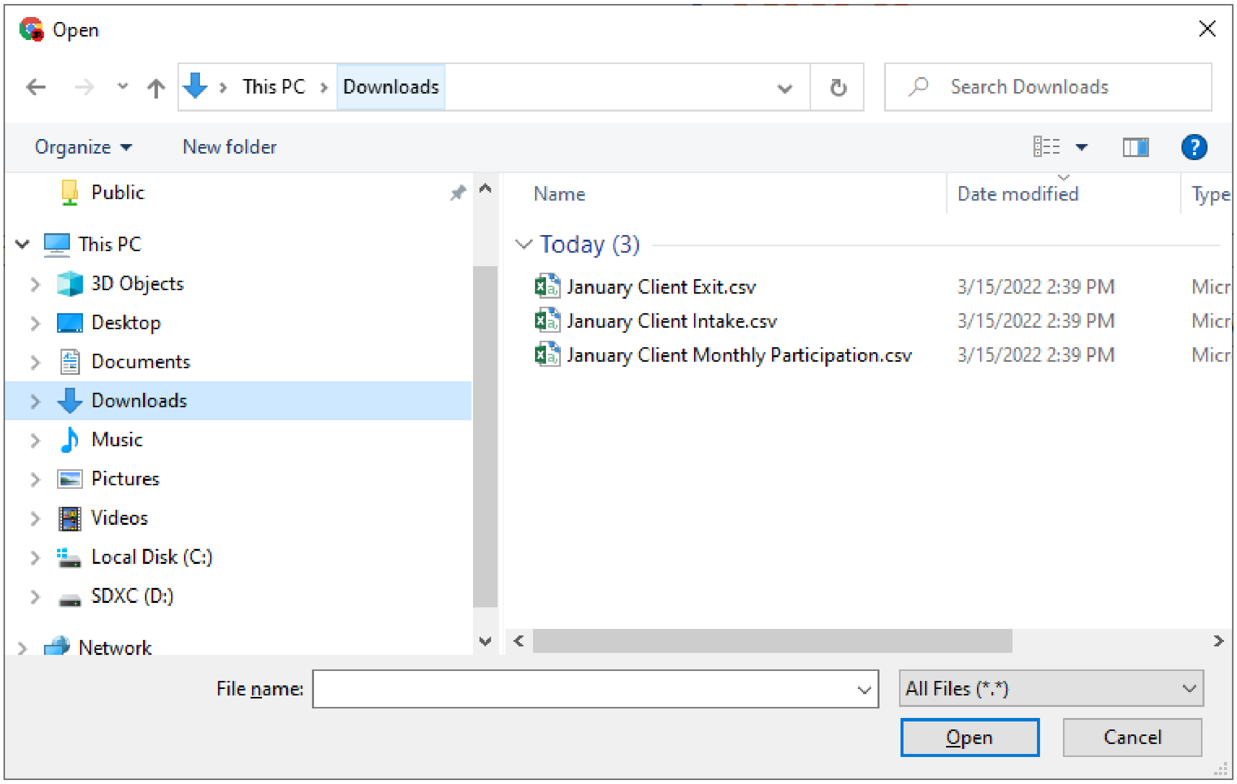


Step 3. Click the "Choose CSV File" button at the bottom to upload a .csv file:

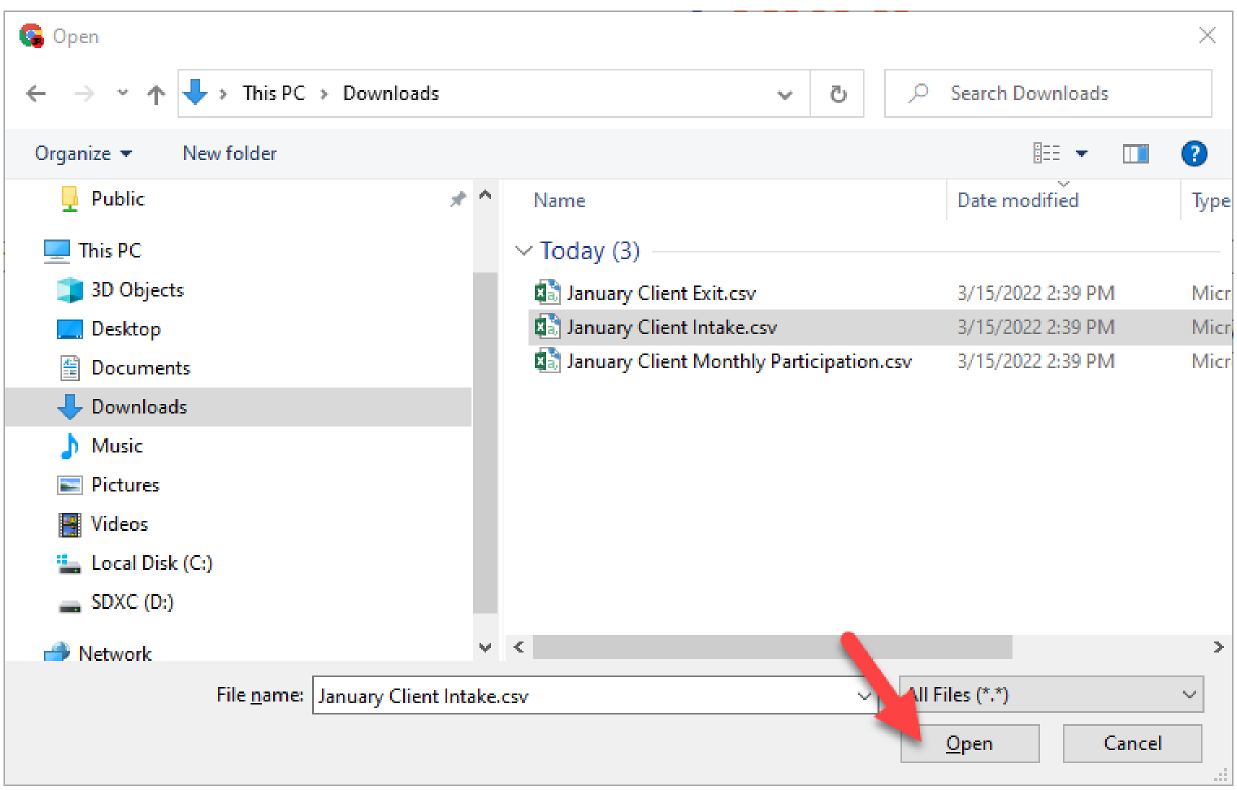


.CSV DATA TRANSFER: CROSSWALK TOOL

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

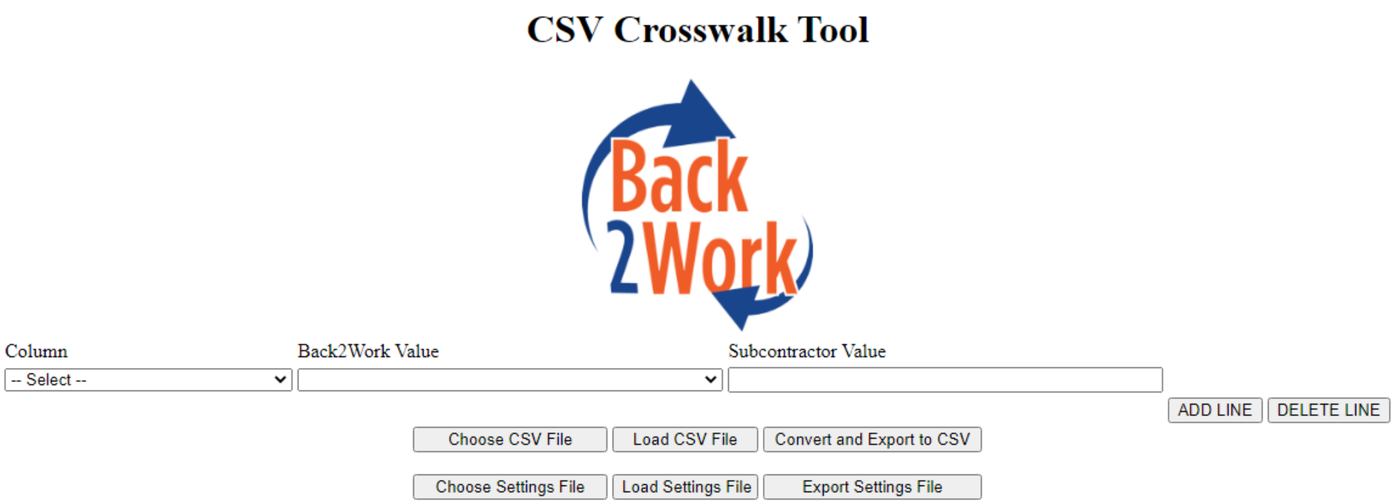


Step 4. Select a .csv file and then click “Open”:

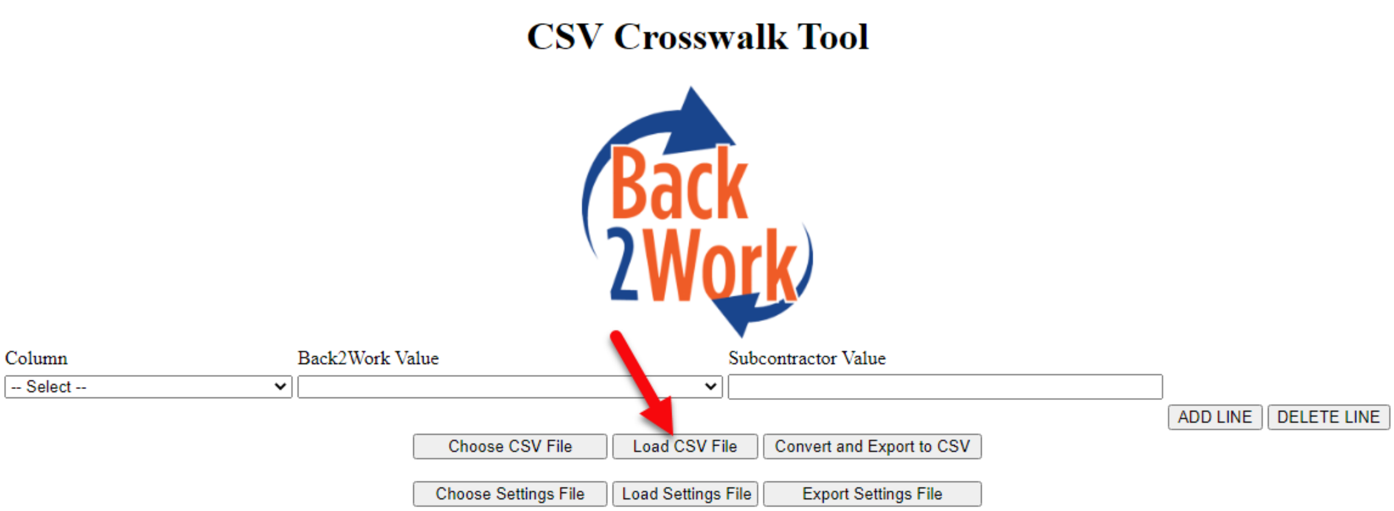


.CSV DATA TRANSFER: CROSSWALK TOOL

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



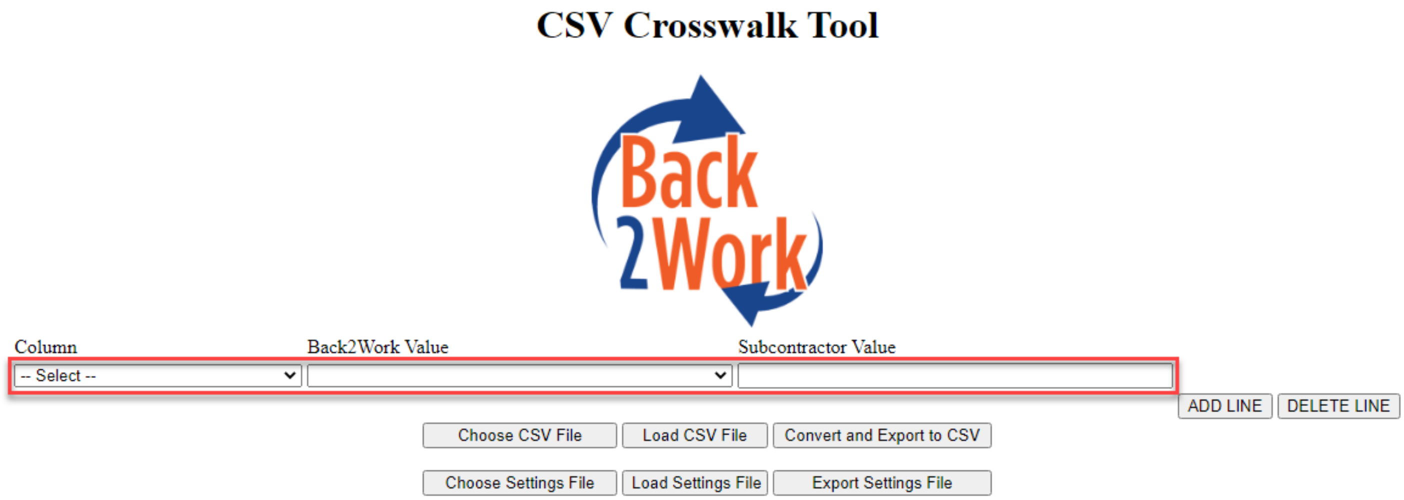
Step 5. Click the "Load CSV File" button:



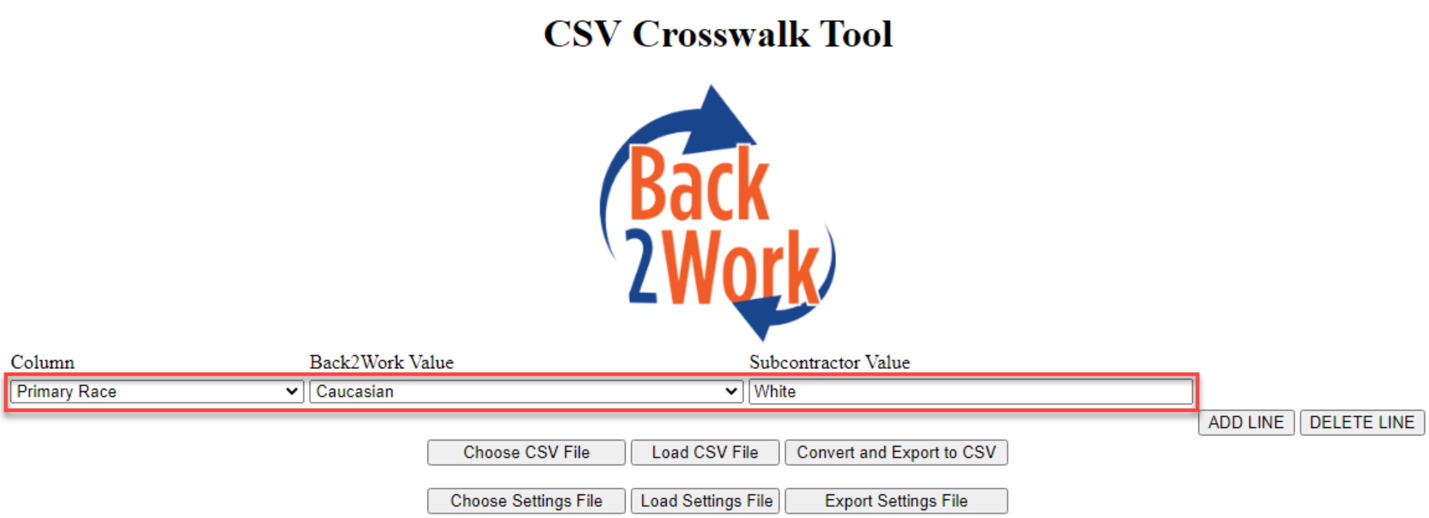
After clicking the "Load CSV File" button in step 5, the data in the .csv file will be provided in a table below the load buttons.

.CSV DATA TRANSFER: CROSSWALK TOOL

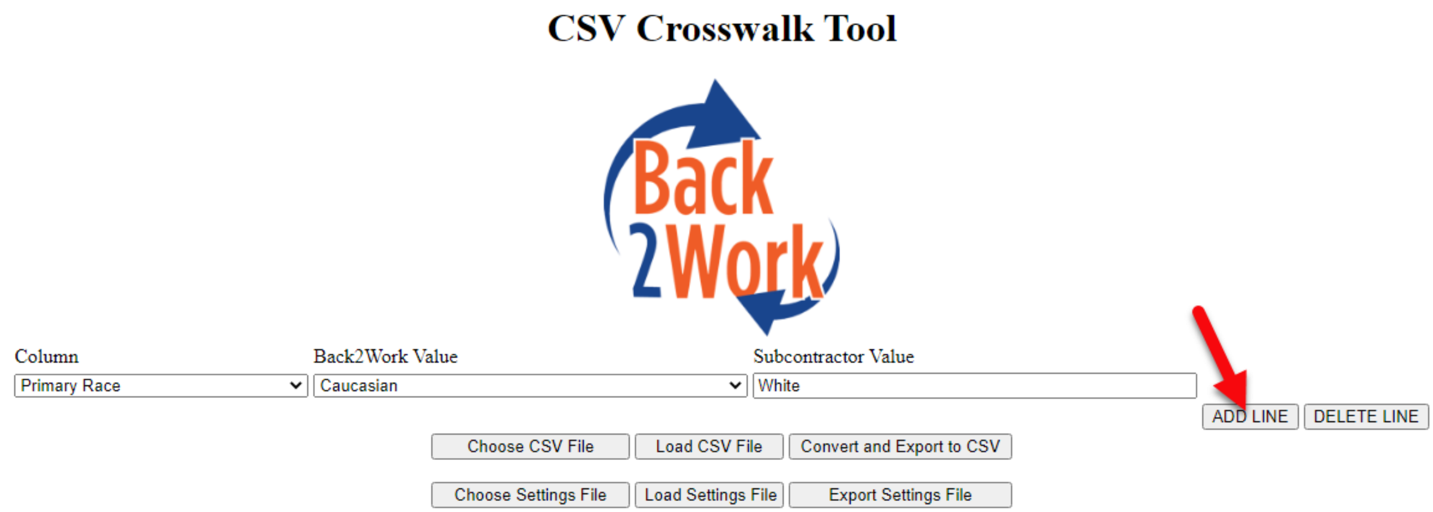
Step 6. Select a Column or Column Heading, select a Back2Work Value, and enter Subcontractor Value text that needs updating:



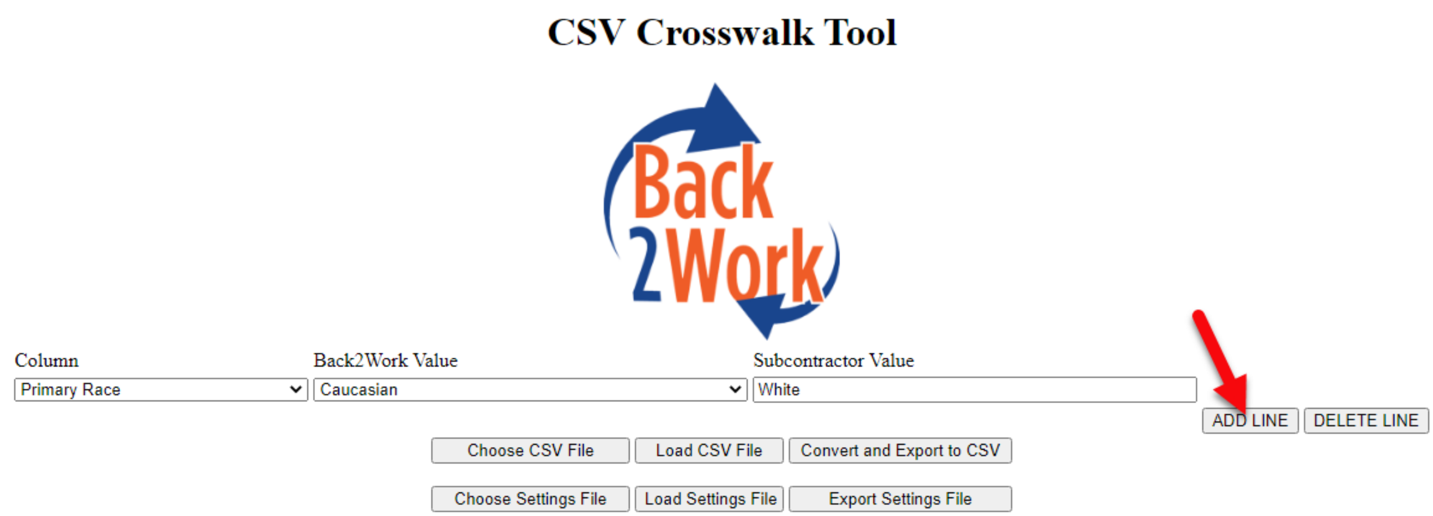
The example below is converting the Subcontractor value “White” to the Back2Work Value “Caucasian” for the Column Primary Race:



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



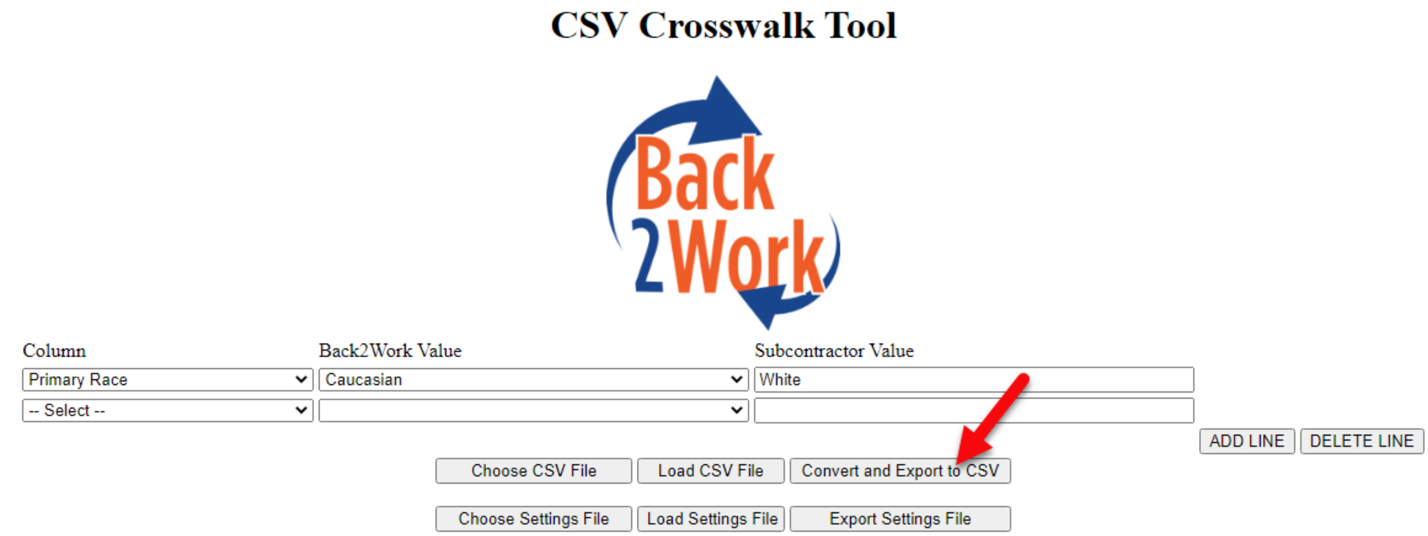
After clicking the “ADD LINE” button in step 7, you should have a second row to enter values into similar to this:



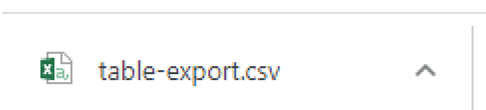
Step 8. Repeat steps 6 and 7 until all necessary values have been setup in the crosswalk.

.CSV DATA TRANSFER: CROSSWALK TOOL

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



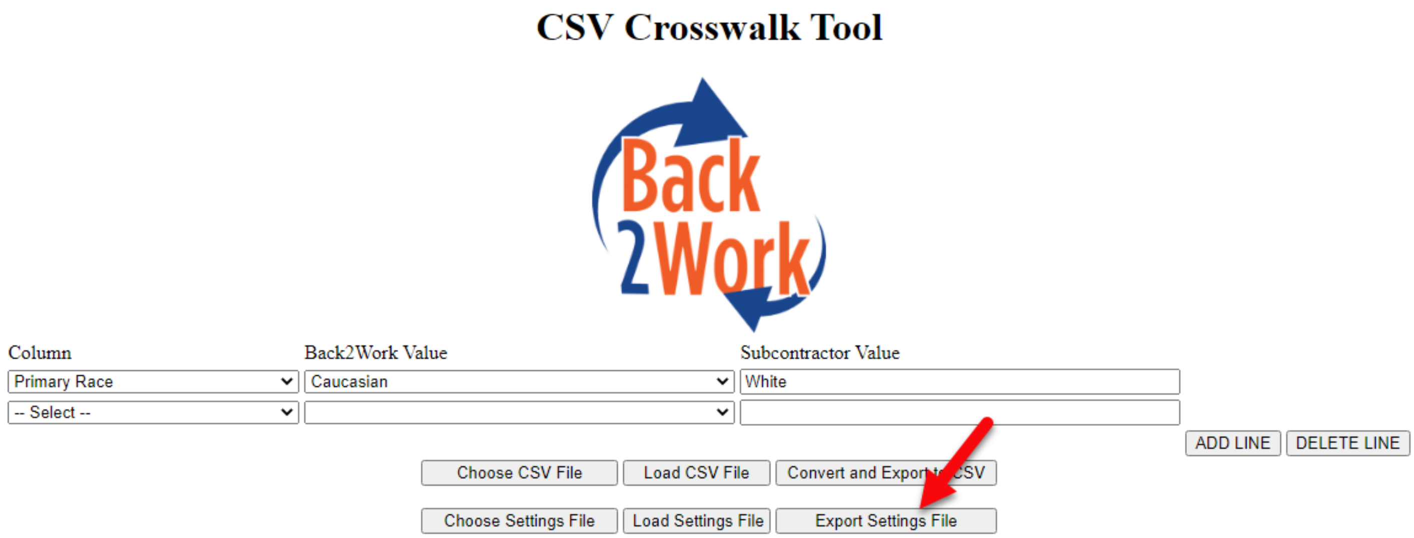
After clicking the “Convert and Export to CSV” button in step 9, your file is now ready and usually can be found in the bottom-left corner of your browser with the file name “table-export.csv”:



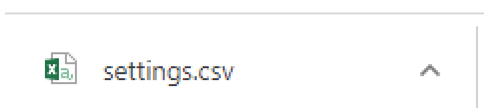
Step 10. Repeat steps 3-10 for each of the three .csv files as necessary including data for Client Intakes, Exits, and Monthly Participation.

.CSV DATA TRANSFER: CROSSWALK TOOL

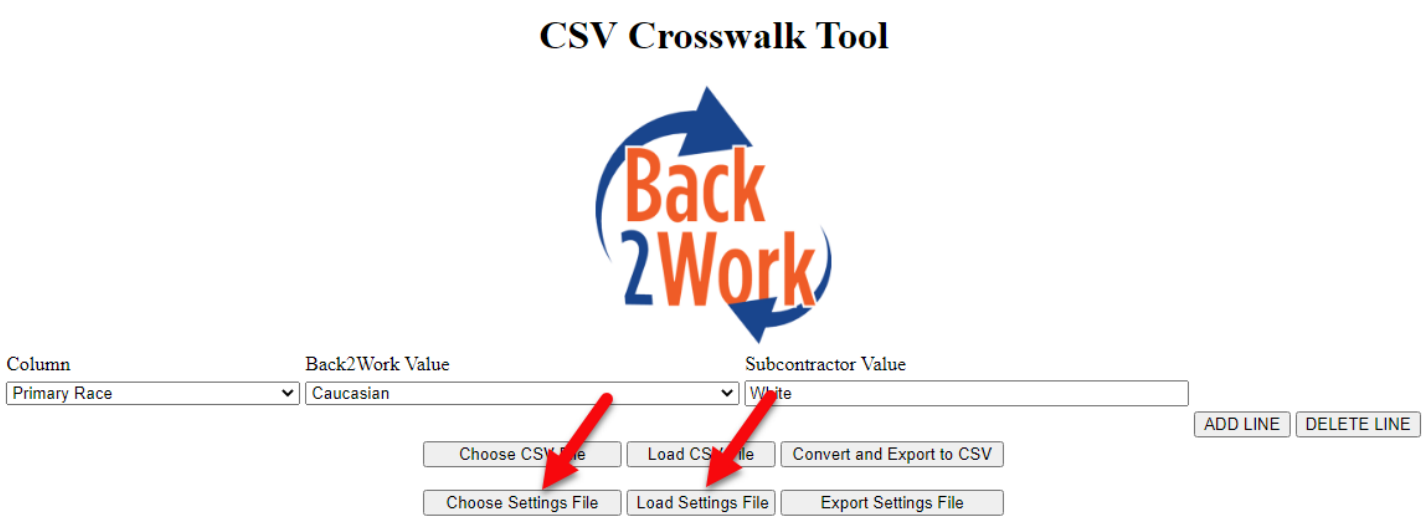
Step 11. After adding as many rows to the crosswalk tool as needed to convert your csv files, you can save the crosswalk settings by clicking the "Export Settings File" button:



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":

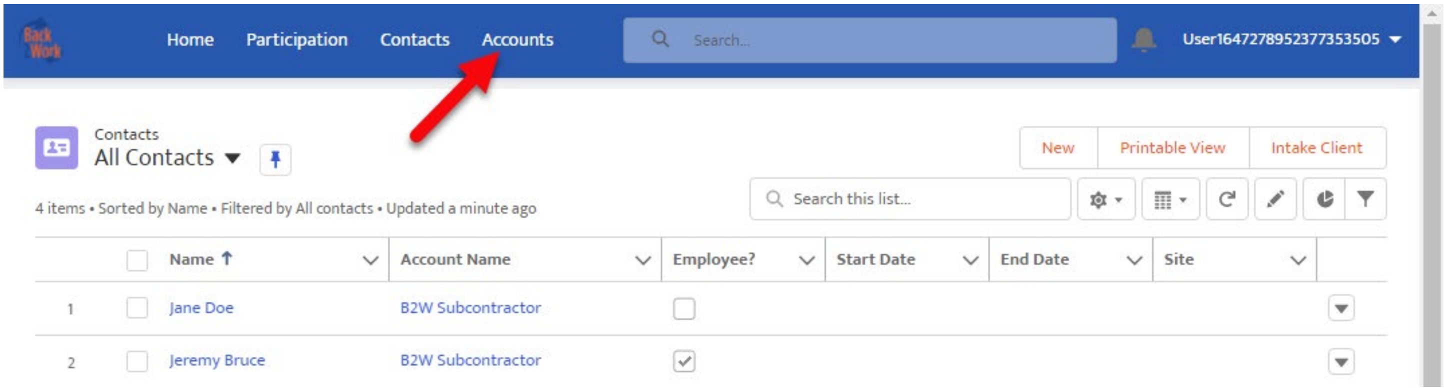


Step 12. In subsequent use of this crosswalk tool you can load the settings.csv file using steps similar to steps 3, 4, and 5 by instead clicking the "Choose Settings File" and "Load Settings File" buttons.

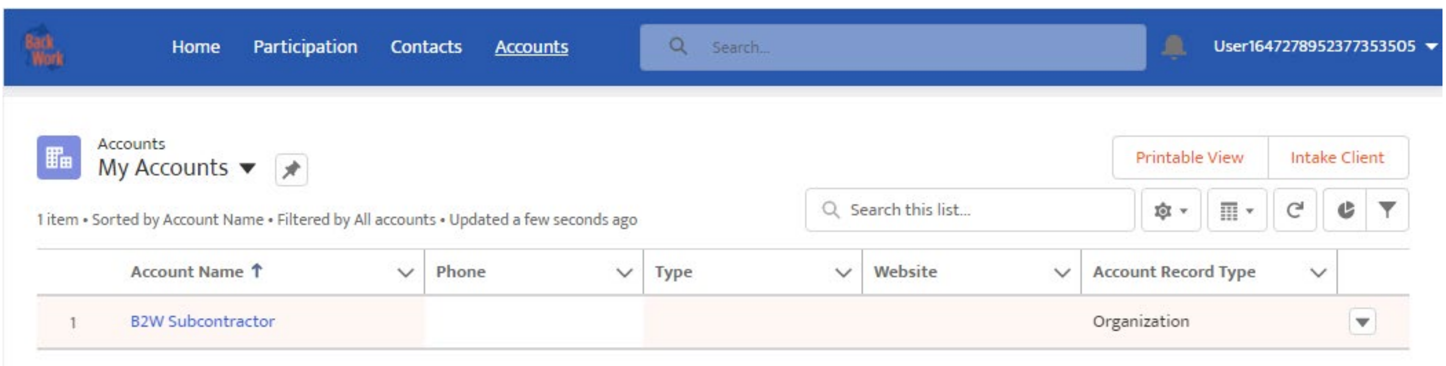


.CSV DATA TRANSFER: SALESFORCE .CSV UPLOAD

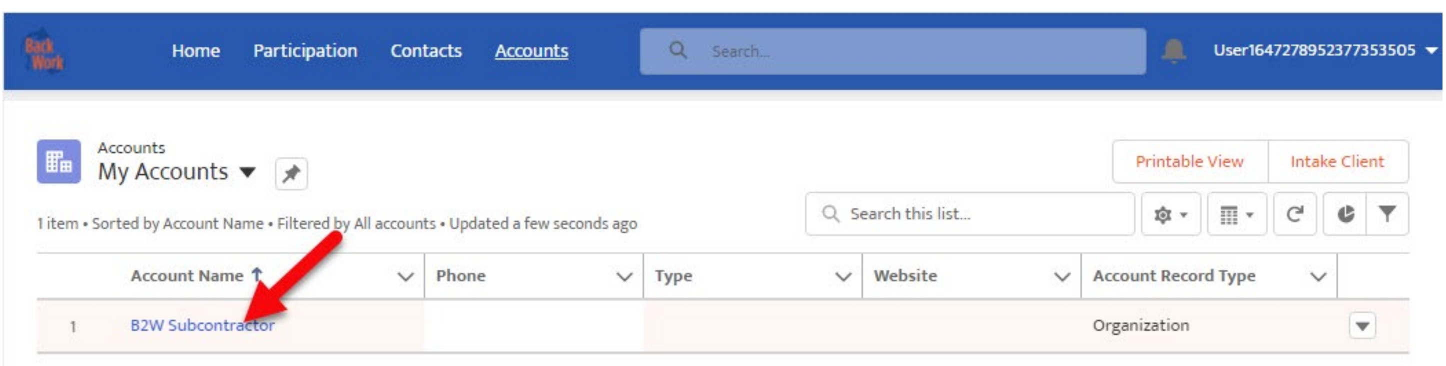
Step 1. After logging into Salesforce, click on the “Accounts” tab.



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

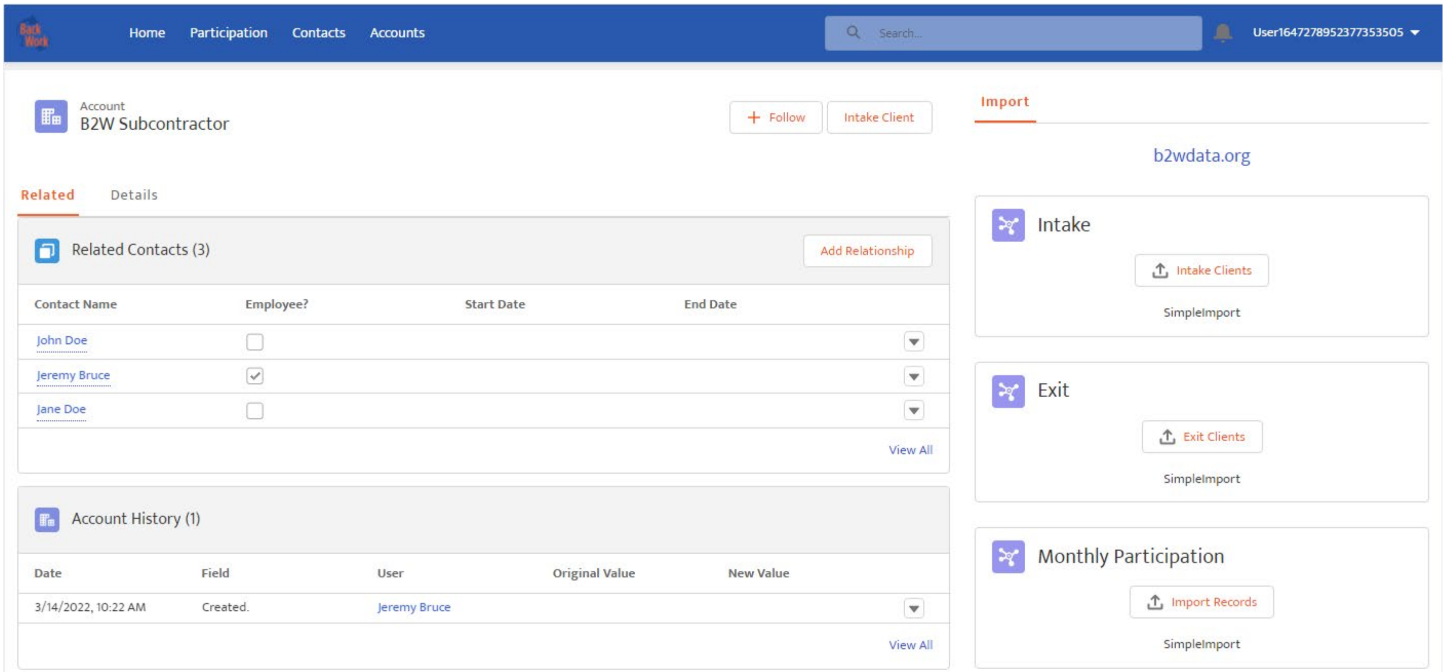


Step 2. Click on your Organization Name:



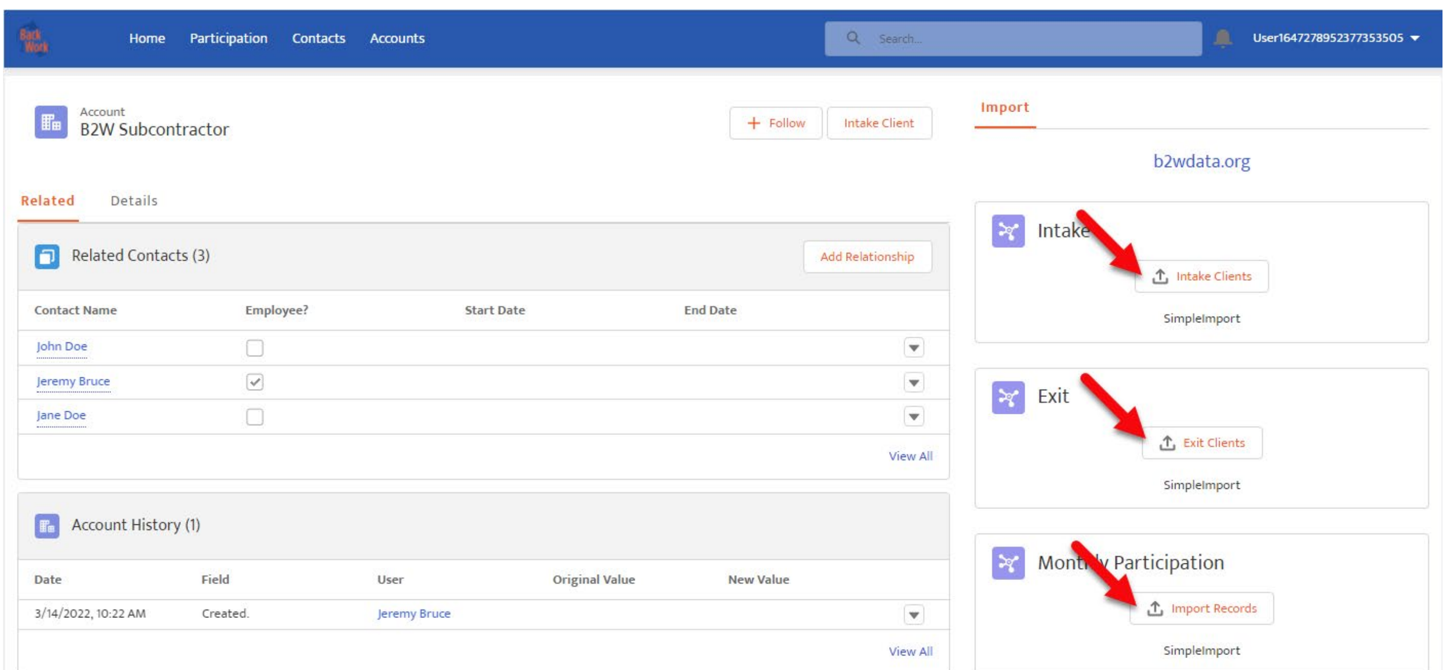
.CSV DATA TRANSFER: SALESFORCE .CSV UPLOAD

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



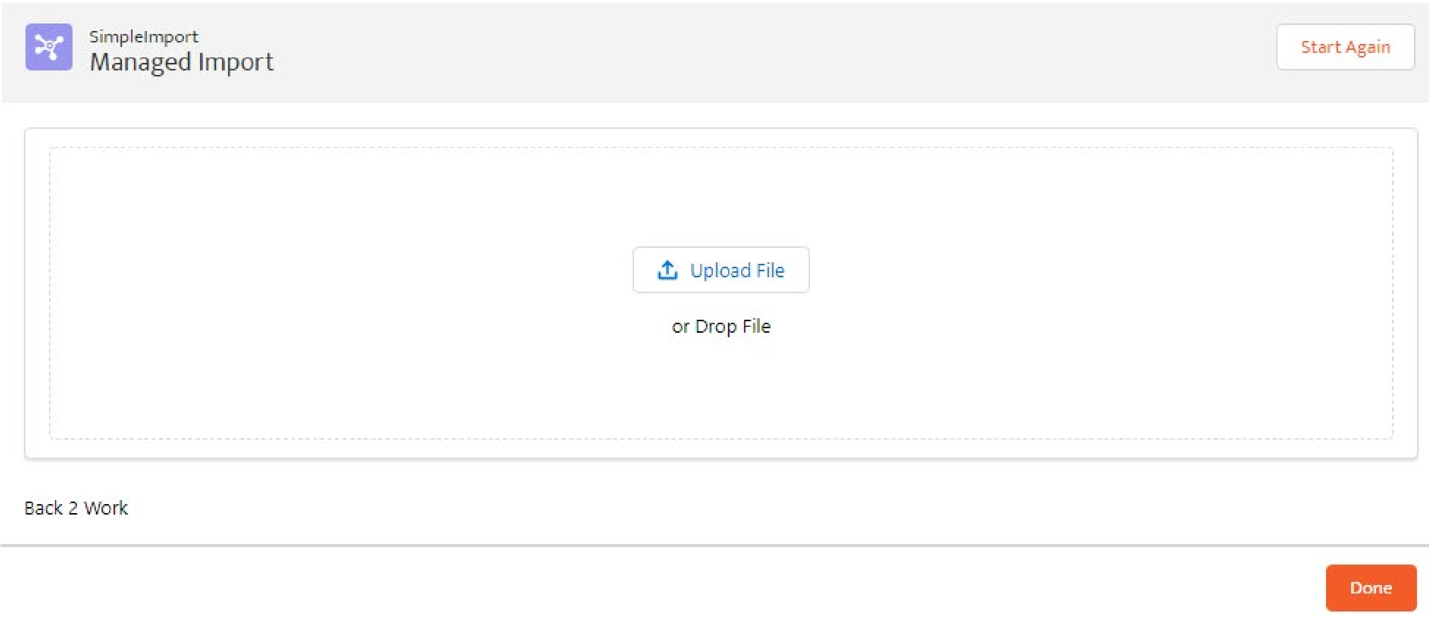
Step 3. Click on either the Intake, Monthly Participation, or Exit button to start the wizard to upload the corresponding .csv file

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

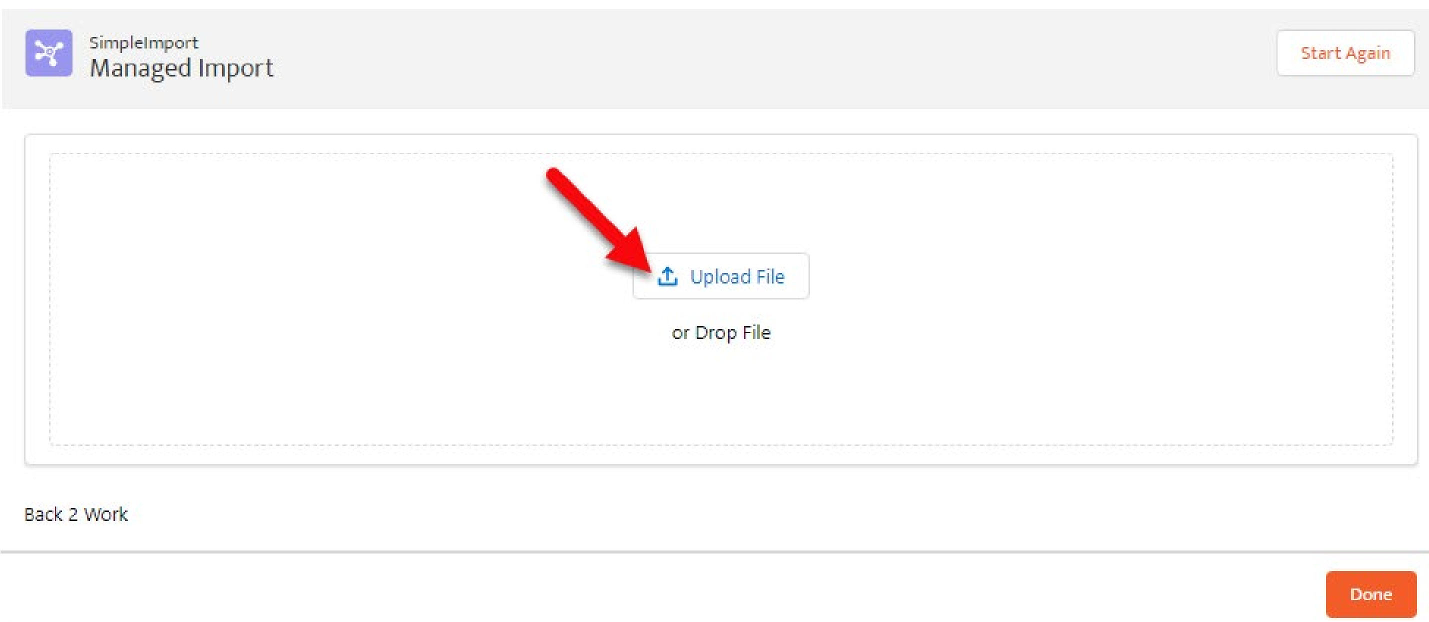


.CSV DATA TRANSFER: SALESFORCE .CSV UPLOAD

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

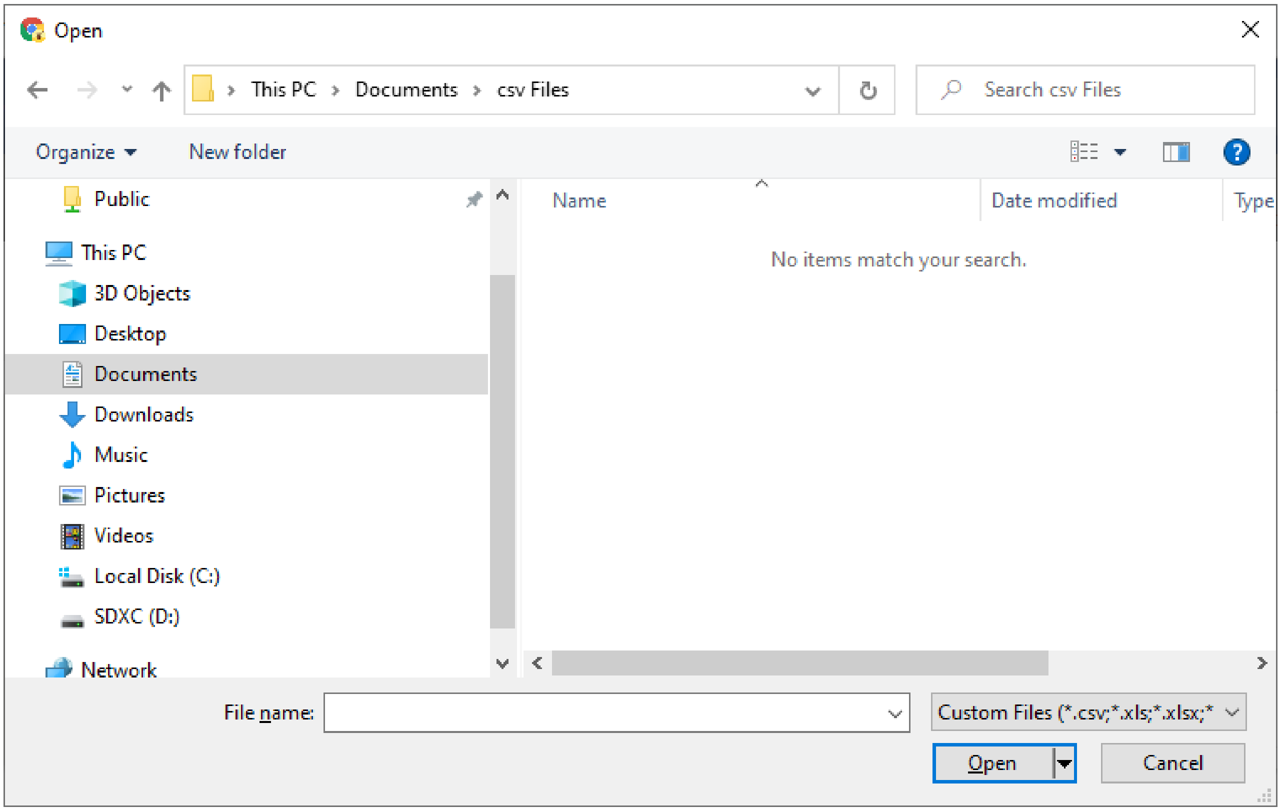


Step 4. Click the “Upload File” button:

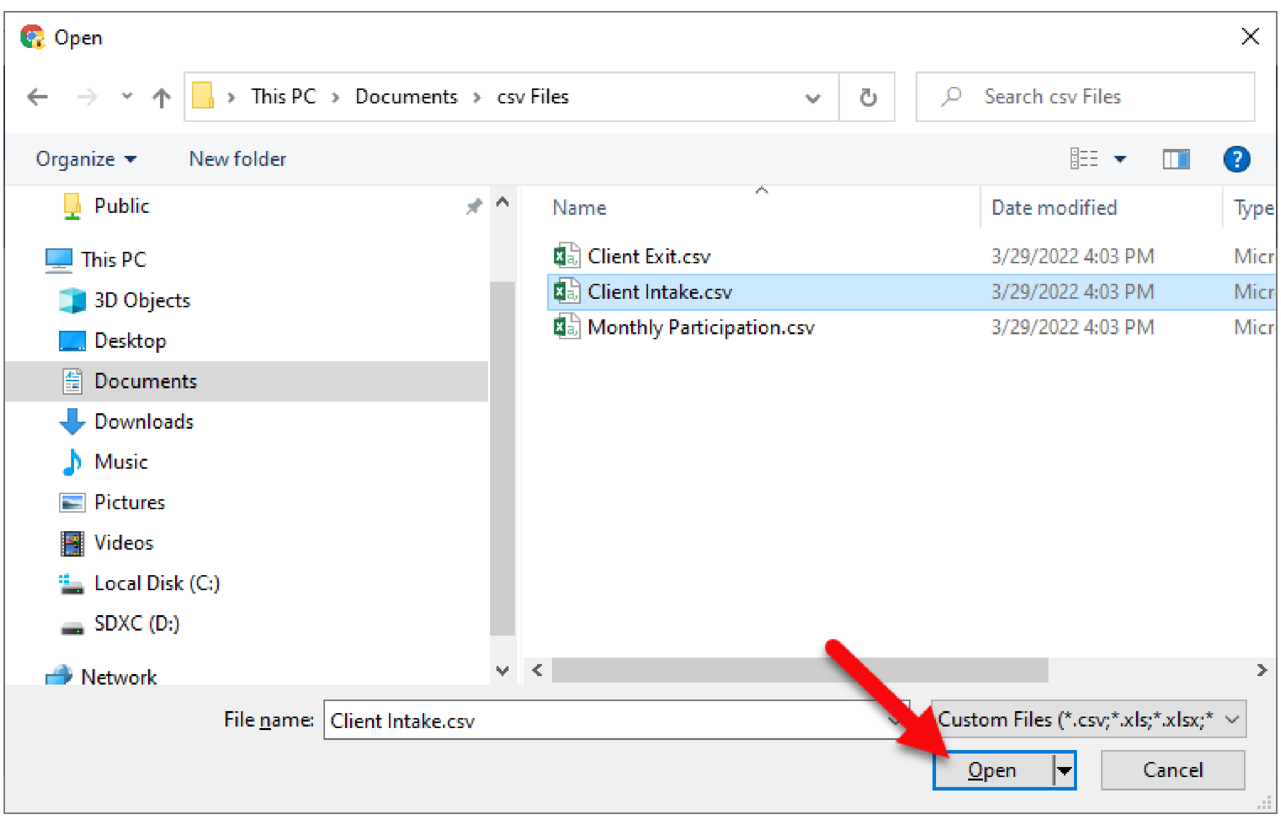


.CSV DATA TRANSFER: SALESFORCE .CSV UPLOAD

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.