

2022

# ELR EFORCE C&L TRAINING GUIDE HANDBOOK



# Introduction

## Welcome to the ELR EForce C&L User Guide



The Department of Veterans Affairs (VA) Education Service is tasked with the immense responsibility of ensuring that the GI Bill education and job training programs serve those who have served us. One critical aspect of this task is performing approval reviews. This challenging task is difficult to perform, monitor, manage, and report on due to various computer programs, worksheets, and paperwork. It is further complicated by having staff located throughout the country.

EForce C&L (named for Education Salesforce) was developed as an innovative and sophisticated solution to these problems. EForce C&L is a Salesforce application developed cooperatively by Acumen Solutions, Accenture Federal, and internal VA Education Compliance and Liaison staff. Salesforce is a cloud-computing company that VA is utilizing for its customer relationship management product, offering streamlined communication, and reporting features.

This guide is intended to introduce you to the EForce C&L functions as an ELR. Learning any new system can be a complicated and frustrating process. Fortunately, EForce C&L is easy to use. As a web-based cloud computing platform, Salesforce will allow you to be more mobile and have unlimited storage capabilities. Keep in mind that access to EForce C&L requires a VBA Domain Active Directory account and VPN access.

EForce C&L will help you process approvals quicker, easier, and more mobile than ever before.

- The National Training Team-Compliance

# Master Table of Contents

Use this Table of Contents to locate the various sections of the User Guide. At the bottom of the table, refer to individual table of contents by User. Each of those sections will begin with another Table of Contents specific to the user type and the features and functionality of EForce C&L that are covered within that section.

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# VA ELR HELP

For support and questions, please contact the EForce Mailbox below. Do not contact the VA Help Desk.

<a href="#">EForce Mailbox</a>	VAVBASTL/RO/EFORCE or email: <a href="mailto:EFORCE.VBASTL@va.gov">EFORCE.VBASTL@va.gov</a>

# Getting Started

# Getting Started

## Salesforce Basics-Banner

The Banner appears at the top of every page in Salesforce. Key features of the Banner include **Global Search**, **App Launcher**, **User Profile**, and **Tabs**.

The image shows a screenshot of the Salesforce Banner with four callout boxes explaining its features:

- Global Search:** A callout box points to the search bar, stating: "Global Search allows you to enter a term(s) on which to search all records in Salesforce. See page 7 for more details on searching in Salesforce."
- User Profile:** A callout box points to the user icon, stating: "Click on the User Icon to display your name and provide access to your settings."
- Application Tab:** A callout box points to the "EForce-C&L Lightning" tab, stating: "The **Application** tab indicates the application in which you are working. Your Salesforce Profile will determine your default Application. For now, there is one custom Application for VA Compliance & Liaison: EForce-C&L."
- Tabs (Objects):** A callout box points to the navigation menu, stating: "The **Tabs (also known as Objects)** (Facilities, Trip, GSA Vehicles, etc.) appear on every page in Salesforce. Click on a Tab to be taken to that Object's Home page. See page X for more details about the Home page of an Object."

The Banner itself includes the Salesforce logo, a search bar with "Search Salesforce" text, a user icon, and a navigation menu with tabs: "Home", "Approvals", "Facilities", "Scheduled Facilities", "Reports", "Dashboards", "Contacts", and "Chatter".

# Getting Started

## Home Tab Overview

The EForce C&L **Home** page is the landing page and is accessible by clicking on the **Home Tab**. The homepage will vary based on what type of user you are, but sections of the Home page include: **Dashboards**, **Today's Tasks**, your **Salesforce Calendar**, **Items to Approve**, and **Chatter**. Additionally, you can **Show** or **Hide** your **What I Follow** Chatter Feed near the top of the Home page.

The screenshot shows the EForce C&L Lightning interface. At the top, there is a navigation bar with tabs for Home, Approvals, Facilities, Scheduled Facilities, Reports, Dashboards, Contacts, and Chatter. The main content area is divided into several sections:

- SAA DASHBOARD CURRENT FY:** A dashboard snapshot showing current FY data for SAA QUEUE. It includes a refresh button and a note: "Last refreshed 23 days ago. Refresh this dashboard to see the latest data. As of May 2, 2019 9:40 AM Viewing as Lesmie Converted SAA." Below this are three donut charts: "SAA QUEUE SCHEDULE BY FACILITY", "SAA QUEUE SCHEDULE BY STATUS", and "SAA QUEUE - % COMPLETED". Each chart shows a record count of 11. The first chart has a legend for Facility Type Section (In Progress, Completed, NCD). The second chart has a legend for Survey Status (In Progress, Completed). The third chart has a legend for End Product Date Count (In Progress, Completed).
- Items to Approve:** A section with the message "No approval requests need your attention right now."
- Today's Events:** A section with a "View Calendar" button.
- Today's Tasks:** A section with a list of tasks and a drop-down menu in the upper right-hand corner.
- Chatter:** A feed on the right side of the page with a search bar and a "Share" button.

Callouts provide additional information:

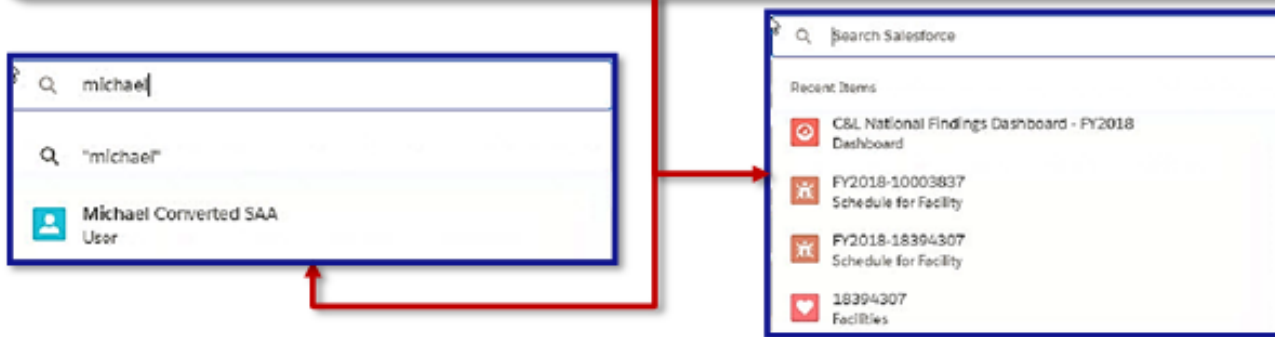
- Dashboard Snapshot:** "If the **As of** date displaying in the Dashboard Snapshot is not current, be sure to click **Refresh**."
- Chatter Feed:** "Your **Chatter** feed is located to the right. It is always visible on the home page."
- Today's Events:** "Upcoming events display in a list format. To view your salesforce calendar in a weekly view, click on **View Calendar** in the **Today's Events** section."
- Today's Tasks:** "The **Today's Tasks** section displays a list of open Tasks that are assigned to you (the owner). An Open Task does not have a Completed Task **Status**. To filter your open Tasks that are displaying, use the drop-down menu in the upper right-hand corner of the section."

# Getting Started

## Global Search

One way to locate information in Salesforce is to use the **Global Search** feature. Global Search appears at the top of every page and allows you to enter a keyword(s), known as a search term(s) on which to search all records in EForce C&L at VA Compliance & Liaison. To expand the results of your search, Salesforce Global Search supports wildcard functionality.

You can click on the magnifying glass next to your search term. Salesforce will execute a search on that text. Or, EForce remembers when there is a record(s) you recently viewed or edited that contains the search term(s) in the key field of the record and displays them automatically as you type. Links to these records will display just below the Global Search bar. Clicking on the record will display the record and no search will be conducted.



Search Feature	Description
* Asterisk	Broaden your search results with the asterisk wildcard. Use * to include one or more characters in the search term. For example, searching for <b>bob jo*</b> finds records with <b>Bob Jones</b> and <b>Bob Johnson</b> .
AND	Finds records that match all of the search terms. For example, <b>acme AND bethesda</b> finds records with both the word <b>acme</b> and the word <b>bethesda</b> . <b>Note:</b> Using AND is optional, since searching for <b>acme bethesda</b> is the same as searching for <b>acme AND bethesda</b> .
OR	Finds items with at least one of the search terms. For example, <b>acme OR bethesda</b> finds records with either <b>acme</b> or <b>bethesda</b> , or both <b>acme and bethesda</b> .
AND NOT	Finds records that do not contain one of the search terms. For example, <b>acme AND NOT bethesda</b> finds records that include <b>acme</b> but do not include <b>bethesda</b> .
“ “ Quotation Marks	Use quotation marks around search terms to find an exact match. This can be especially useful when searching for text with punctuation. For example, <b>"acme.com"</b> finds records that contain the exact text <b>acme.com</b> . A search for <b>"monday meeting"</b> finds items that contain the exact phrase <b>monday meeting</b> .
? Question Mark	Use the question mark wildcard to match a single character. For example, searching for <b>jo?n</b> finds items with <b>John</b> and <b>Joan</b> .



# Getting Started

## Global Search Results

The results of a **Global Search** will display on the **Search Results** page. The page is divided into two main sections. The panel section on the left allows you to view the Search Results from each object. To the right of the left panel, the main section displays Records that match the search term(s). Once you have found the record you need, click on the key field of the record to view it. **Note:** Your Search Results will only contain data to which you have access.

**Search Results** default to a **Records** search. Review the results, which are grouped by Object. To drill down into the result for a single Object, click on the Object name to display only the results from that Object to the right in the main section of the Search Results page.

The screenshot shows the EForce-C&L Lightning interface. The left sidebar contains a 'SEARCH RESULTS' section with a list of categories: Top Results, Approvals, Facilities, Scheduled Facilities, Reports, Trip, GSA Vehicles, Trip Wrap-Up, Survey Visit and Findings, Quality Reviews, Dashboards, Contacts, Chatter, and a 'Show More' link. The main content area is titled 'Facilities' and shows '5 Results • Sorted by Relevance'. Below this is a table with columns: FACI..., FACILITY NAME, F..., CITY, DATE O..., Z..., CEL..., and a dropdown arrow. The table lists five records for various schools and institutes. A 'View More' button is located at the top right of this table. Below the 'Facilities' table is a section for 'Scheduled Facilities' with '5 Results • Sorted by Relevance' and another 'View More' button. A callout box points to the 'View More' button in the 'Facilities' section.

FACI...	FACILITY NAME	F...	CITY	DATE O...	Z...	CEL...	
NewFac22	Xavler's School for the Gifted and Talented		City Beautiful		66541	Central	
25021806	THE SALON PROFESSIONAL ACADEMY-COLORADO SPRINGS	NCD2		4/4/2016	00238	Western	No
21013506	UNIVERSITY OF THE ROCKIES	IHL2		11/12/2015	00228	Western	Yes
24905438	THE ART INSTITUTE OF PITTSBURGH	IHL2		6/13/2017	00164	Eastern	Yes
25442310	DIGITAL ANIMATION & VISUAL EFFECTS SCHOOL THE DAVE SCHOOL-ORLANDO	NCD2		2/22/2017	00051	Southern	Yes

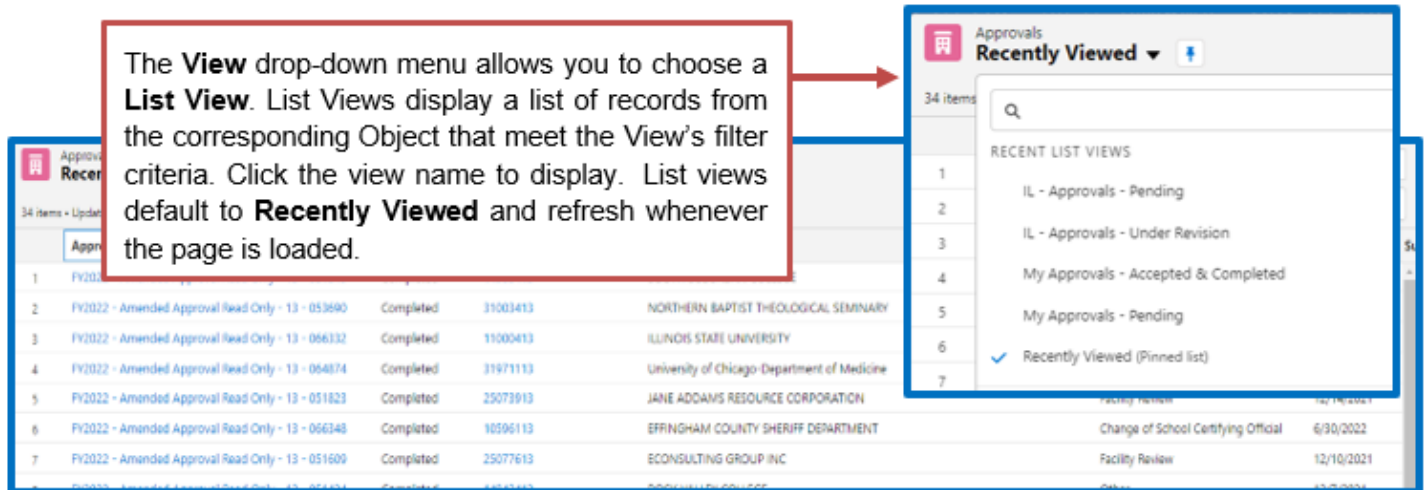
Up to five (5) records will display by default in an Object's results. Click **View More** to see up to 25 records displayed. If there are more than 25 records in the results for that Object, you will have the option to scroll to the Next or Previous 25 records.

# Getting Started

## Object Home Pages-List Views

Clicking on the Approvals, GSA Vehicles, Reports, or Dashboards Objects (tabs at the top of the page) will display the corresponding Object's Home page. For example, clicking on the Approvals Tab will display the Approvals Object Home page. At the top of an Object's Home page is a filtering tool known as **List Views**. List Views are a quick and easy way to locate records belonging to a single Object based on predefined filter criteria of the View. The List Views for the Approvals Object will also contain Approval Queues.

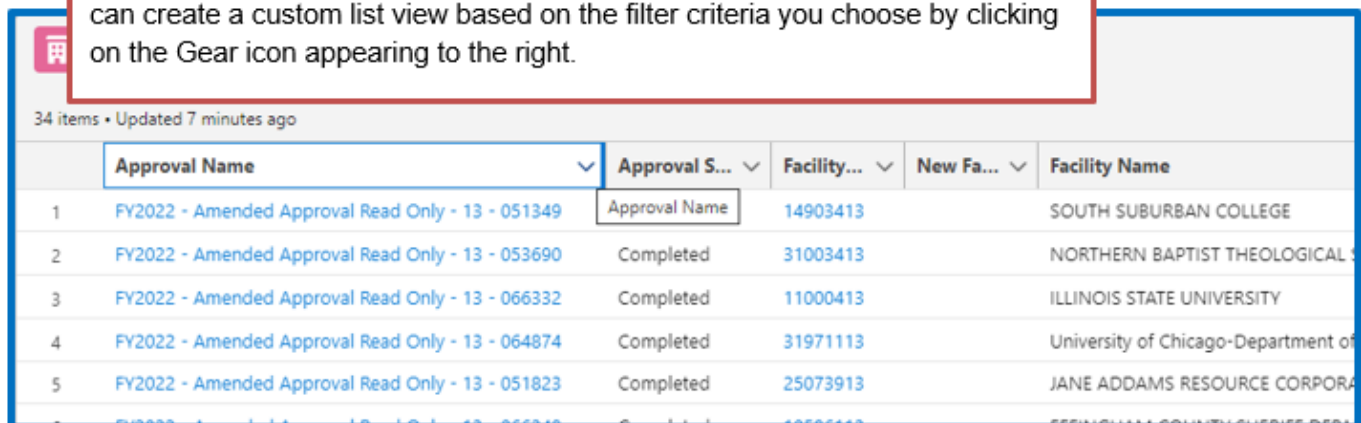
The **View** drop-down menu allows you to choose a **List View**. List Views display a list of records from the corresponding Object that meet the View's filter criteria. Click the view name to display. List views default to **Recently Viewed** and refresh whenever the page is loaded.



The screenshot shows the 'Approvals' object home page. At the top, there is a 'Recently Viewed' dropdown menu with a search icon and a list of recent list views. Below the menu is a table of 34 items. The table has columns for 'Approval Name', 'Approval S...', 'Facility...', 'New Fa...', and 'Facility Name'. The first few rows of the table are:

	Approval Name	Approval S...	Facility...	New Fa...	Facility Name
1	FY2022 - Amended Approval Read Only - 13 - 051349	Approval Name	14903413		SOUTH SUBURBAN COLLEGE
2	FY2022 - Amended Approval Read Only - 13 - 053690	Completed	31003413		NORTHERN BAPTIST THEOLOGICAL S
3	FY2022 - Amended Approval Read Only - 13 - 066332	Completed	11000413		ILLINOIS STATE UNIVERSITY
4	FY2022 - Amended Approval Read Only - 13 - 064874	Completed	31971113		University of Chicago-Department of
5	FY2022 - Amended Approval Read Only - 13 - 051823	Completed	25073913		JANE ADDAMS RESOURCE CORPORA

For all Objects(tabs), a List View provides you with several time-saving features. You can sort the list of records displaying on any of the column headers by clicking the column header once for increasing order and twice for decreasing order. List Views always default to sorting on the Name field. You can create a custom list view based on the filter criteria you choose by clicking on the Gear icon appearing to the right.



The screenshot shows the 'Approvals' object home page. At the top, there is a '34 items • Updated 7 minutes ago' status. Below it is a table with column headers: 'Approval Name', 'Approval S...', 'Facility...', 'New Fa...', and 'Facility Name'. The first few rows of the table are:

	Approval Name	Approval S...	Facility...	New Fa...	Facility Name
1	FY2022 - Amended Approval Read Only - 13 - 051349	Approval Name	14903413		SOUTH SUBURBAN COLLEGE
2	FY2022 - Amended Approval Read Only - 13 - 053690	Completed	31003413		NORTHERN BAPTIST THEOLOGICAL S
3	FY2022 - Amended Approval Read Only - 13 - 066332	Completed	11000413		ILLINOIS STATE UNIVERSITY
4	FY2022 - Amended Approval Read Only - 13 - 064874	Completed	31971113		University of Chicago-Department of
5	FY2022 - Amended Approval Read Only - 13 - 051823	Completed	25073913		JANE ADDAMS RESOURCE CORPORA

# Getting Started

## Viewing Records-Details View

### Viewing Detail Sections and Related Lists

All records in EForce-C&L display in Details view when viewed individually. When viewing the Details, you will see the record's fields displaying in unique sections and you'll have access to the record's Related Lists by clicking on the Related list link.

Approval  
FY2022 - Amended Approval Read Only - 13 - 051349

Overview Related File Upload/Download

Submitted Information

Approval Name	FY2022 - Amended Approval Read Only - 13 - 051349
Facility Name	SOUTH SUBURBAN COLLEGE
Facility Code	14903413
FY Approvals	2022
Accreditation	Yes
Facility State Code	13
Facility Type Registration	Public
Facility Type Section	IHL
Type of Change	Other
Type of Change - Other Reason	Additions of Programs
Effective Date	
Catalog Reviewed	New Catalog Received & Reviewed
Catalog Effective Date	8/16/2021

Is the Zip Code changing?  
Foreign Country  
Comments

The main section of the Overview appears first and contains the key data fields for the record. Below the main section are additional Detail sections. On the Schedule for Facilities, the Detail sections are *Submitted Information, Submitter Information, Assignment & Status Details, Reviewer Section, Approver Section, Approval Control Management, and System Information*. You can collapse or expand each section by clicking on the arrow icon displaying to the left of the section name. Collapsing a section is a sticky setting and will be applied to all records in the Object until it is expanded.

Approval  
FY2022 - Amended Approval Read Only - 13 - 051349

Overview Related File Upload/Download

Notes (0) New

Files (6+) Add Files

FY22-14903413-850WCLR Jun 25, 2022 • 58KB • pdf	22-14903413-1998 SOUTH SUBURBAN COLLEGE Jun 25, 2022 • 2.8MB • pdf
South Suburban College - VA Form 22-8794 Dec 7, 2021 • 887KB • pdf	South Suburban College - VA Form 20-8206 Dec 7, 2021 • 37KB • pdf
South Suburban College - Power of Attorney Form Dec 7, 2021 • 62KB • pdf	

View All

Facilities Approval Checklists (0)

Facilities (Approval Record) (0)

Approvals End Product Credits (1) Settings Refresh

1 item • Updated a few seconds ago

<input type="checkbox"/> EPC#	▼	EP Taken	▼	End Product Date	▼	Created By	▼
-------------------------------	---	----------	---	------------------	---	------------	---

Related Lists allow you to see related information. Click on View All on individual lists to see all the related information.

# Getting Started

## Viewing Records-Chatter Feed View

### Chatter Feed View

Almost all records, Scheduled Facilities in particular, in EForce C&L have the option to display the Chatter feed. In Feed view, you can use Chatter actions to create a Chatter Post. You will also be able to view all Chatter Feed Activity related to that record in a first-in, first-out order.

Approval  
FY2022 - Amended Approval Read Only - 13 - 051349

+ Follow Edit Sharing Printable View

Overview Related File Upload/Download

Submitted Information

Approval Name	FY2022 - Amended Approval Read Only - 13 - 051349	Action Request D	
Facility Name	SOUTH SUBURBAN COLLEGE	Address	15800 SOUTH STATE ST
Facility Code	14903413	Address2	
FY Approvals	2022	Address3	
Accreditation	Yes	City	SOUTH HOLLAND
Facility State Code	13	State	IL
Facility Type Registration	Public	Zip Code	60473
Facility Type Section	IHL	Is the Zip Code changing?	
Type of Change	Other	Foreign Country	
Type of Change - Other Reason	Additions of Programs	Comments	

Chatter Activity

Post

Share an update... Share

Search this feed...

Click on the **Chatter** tab in the Activity Panel to the Right.

Chatter Activity

Post

Share an update... Share

Search this feed...

Latest Posts

Most Recent Activity

Collaborate here!  
Here's where you start talking with your colleagues about this record.

To search the feed, enter keywords into the **Search This Feed** textbox and click the magnifying glass.

To sort the feed, click on the Up/Down Arrow icon and select either Latest Posts, or Most Recent Activity.



#### HINTS & TIPS

Chatter Feed is a stream of scrolling information relating to Scheduled Facilities records that you are following. It consists of record updates and Posts made by you and other users.

# Getting Started

## Chatter Feed-Using Chatter Symbols

### Chatter Feed View – Using Chatter Symbols

Chatter uses **symbols** to help direct and track information that makes collaborating with colleagues easy. The information in the table below explains how you can start using the 'at' @ and 'hash tag' # symbols to direct and track information that is important to you.



“AT”

Use the @ symbol to direct a Chatter Post you make to a specific colleague. The post will then show in your colleague's Feed as well. EForce-C&L will also send the colleague an email notification with a link to the Post. This will ensure you are able to directly inform any colleagues about information you have posted. You can @ mention more than one person in a post.



“HASH TAG”

Use the # symbol in front of a string of characters in a Chatter Post to create a Topic and associate it to the Chatter Post. This will enable users to track all Posts containing that specific Topic. You can also add Topics to an existing Post or Follow a Topic.

Some sample Topics for Chatter might be:

- #SCO
- #Transcripts
- #POV

There are no limits as to how many Topics you are entitled to create.

# Getting Started

## Salesforce Field Icons

### Icon & Definition Table

The following table defines standard Salesforce icons that are associated with the fields displaying on a record:


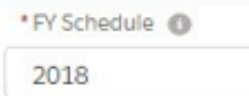




#### HINTS & TIPS

This visibility of each field icon is determined by the user interface.

For example, the **Pencil** and **I** icons appear when you hover your mouse over certain fields in the record Detail section while viewing a record.

The **Required Information**, **Magnifying Glass** “**Lookup**”, appear when the record is in Edit mode. |

Icon	Definition
	If the pencil icon appears when hovering over a field with the mouse, in-line editing is enabled for that field. Double click in the display area of the field to edit the field.
	Required icon is a red asterisk that only displays when the record is in edit mode. If the field is empty, you must enter a value in the field in order to save the record.
	If the magnifying glass “lookup” icon appears the right of a field when editing, it indicates that the field is used to link the current record to another record in Salesforce, assuming the other record exists. If it doesn't, the association cannot be made until the desired record is created.
	If this icon appears to the right of a field label, hovering over it will display helpful text about the field in a pop-up window.

# VA ELR

## Table of Contents

Use this Table of Contents if you are an ELR to locate the various sections of the User Guide that apply to being an ELR.

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# Program Approvals



# Program Approvals

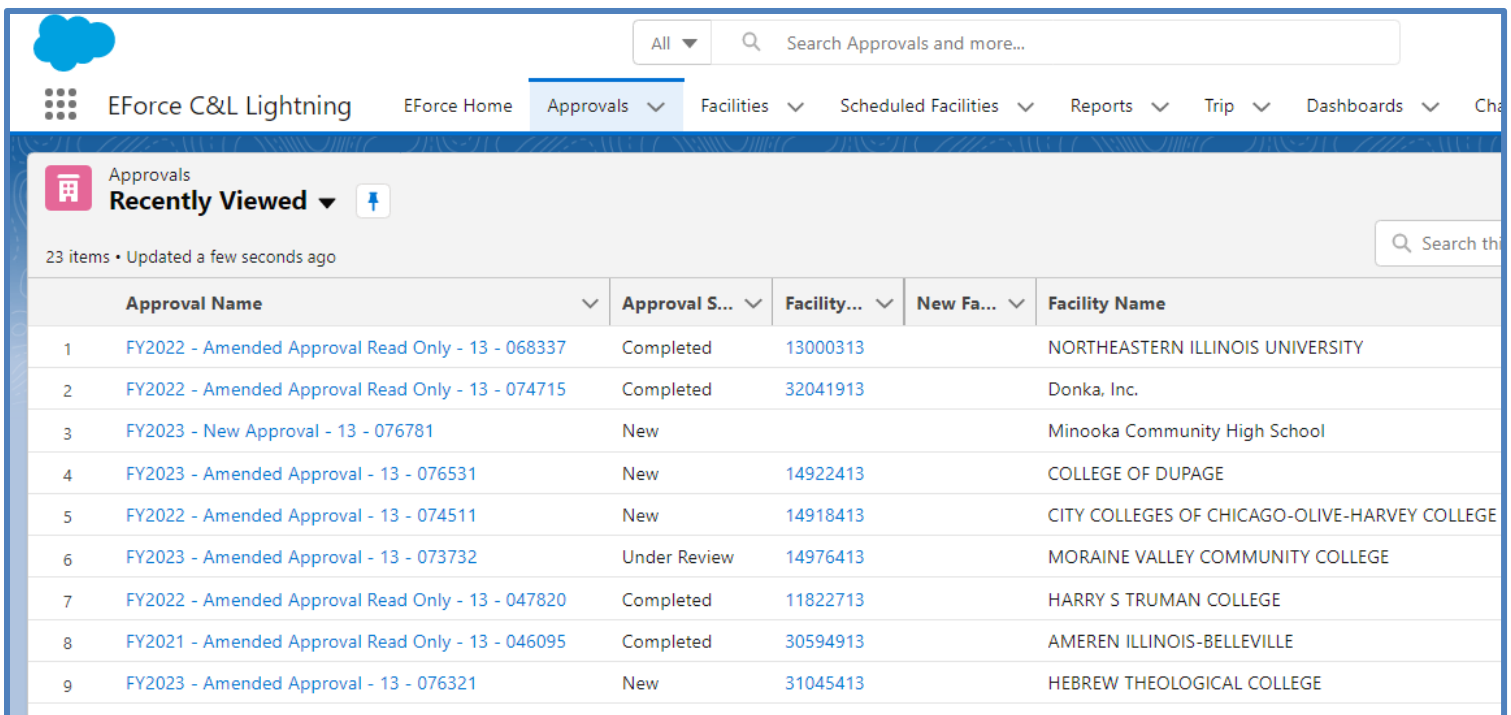
## Approval Process Overview

All Facilities that offer VBA programs must be accepted by the VBA before the program is official. All the information related to their submission will be stored in EForce C&L, in a record in the Approvals object.

Most of these approval records are created ahead of time and assigned to Approval Queues based on their state or region. Approvers will monitor their assigned queue; locate records to be reviewed and approved; add additional information like End Product Credits; and then mark the approval record as approved or rejected.

If accepted, the user will enter in the facility code and create a new active Facility Record; then the approval record is locked to prevent further changes. The user will then send an approval or rejection email using the proper template to the SAA/SCO.

To access Approval records, click on the **Approvals** Tab.



The screenshot shows the EForce C&L Lightning interface. At the top, there is a search bar with the text "Search Approvals and more...". Below the search bar, the navigation menu includes "EForce C&L Lightning", "EForce Home", "Approvals", "Facilities", "Scheduled Facilities", "Reports", "Trip", "Dashboards", and "Cha". The "Approvals" tab is selected, and the page title is "Approvals Recently Viewed". Below the title, it says "23 items • Updated a few seconds ago". A search bar is also present on the right side of the table. The table has the following columns: "Approval Name", "Approval S...", "Facility...", "New Fa...", and "Facility Name".

	Approval Name	Approval S...	Facility...	New Fa...	Facility Name
1	<a href="#">FY2022 - Amended Approval Read Only - 13 - 068337</a>	Completed	13000313		NORTHEASTERN ILLINOIS UNIVERSITY
2	<a href="#">FY2022 - Amended Approval Read Only - 13 - 074715</a>	Completed	32041913		Donka, Inc.
3	<a href="#">FY2023 - New Approval - 13 - 076781</a>	New			Minooka Community High School
4	<a href="#">FY2023 - Amended Approval - 13 - 076531</a>	New	14922413		COLLEGE OF DUPAGE
5	<a href="#">FY2022 - Amended Approval - 13 - 074511</a>	New	14918413		CITY COLLEGES OF CHICAGO-OLIVE-HARVEY COLLEGE
6	<a href="#">FY2023 - Amended Approval - 13 - 073732</a>	Under Review	14976413		MORAIN VALLEY COMMUNITY COLLEGE
7	<a href="#">FY2022 - Amended Approval Read Only - 13 - 047820</a>	Completed	11822713		HARRY S TRUMAN COLLEGE
8	<a href="#">FY2021 - Amended Approval Read Only - 13 - 046095</a>	Completed	30594913		AMEREN ILLINOIS-BELLEVILLE
9	<a href="#">FY2023 - Amended Approval - 13 - 076321</a>	New	31045413		HEBREW THEOLOGICAL COLLEGE

# Program Approvals

## Amended Approvals vs. New Approvals-SAA Submission

### AMENDED APPROVALS

**Amended Approvals** are Approvals for facilities that already have an existing facility code. The SAA submits an Amended Approval following the steps below.

#### Submitting an Amended Approval has 5 basic steps:

1. Verify the Facility does exist in Salesforce
2. Create the Amended record
3. Complete the template & Save (DRAFT)
4. Upload files
5. Press the Submit button (sends to the ELR)

### NEW APPROVALS

**New Approvals** are Approvals for facilities that do not have a facility code. The outcome of processing a NEW Approval is the creation of a **Facility** record. In Salesforce if the facility already exists, it will be processed as an Amended Approval. Keep in mind there may have been a facility code change when searching so search by facility code and facility name. If there is no Facility record in Salesforce, the SAA will proceed to Creation of a New Approval. The SAA submits a New Approval following the steps below.

#### Submitting a New Approval has 5 basic steps:

1. Verify the Facility does not already exist in Salesforce
2. Create the New record
3. Complete the template & Save (DRAFT)
4. Upload files
5. Press the Submit button (sends to the ELR)

Once the Approval is submitted by the SAA as either New or Amended the Approval will appear under the **Approvals Tab** and filtered by queues.

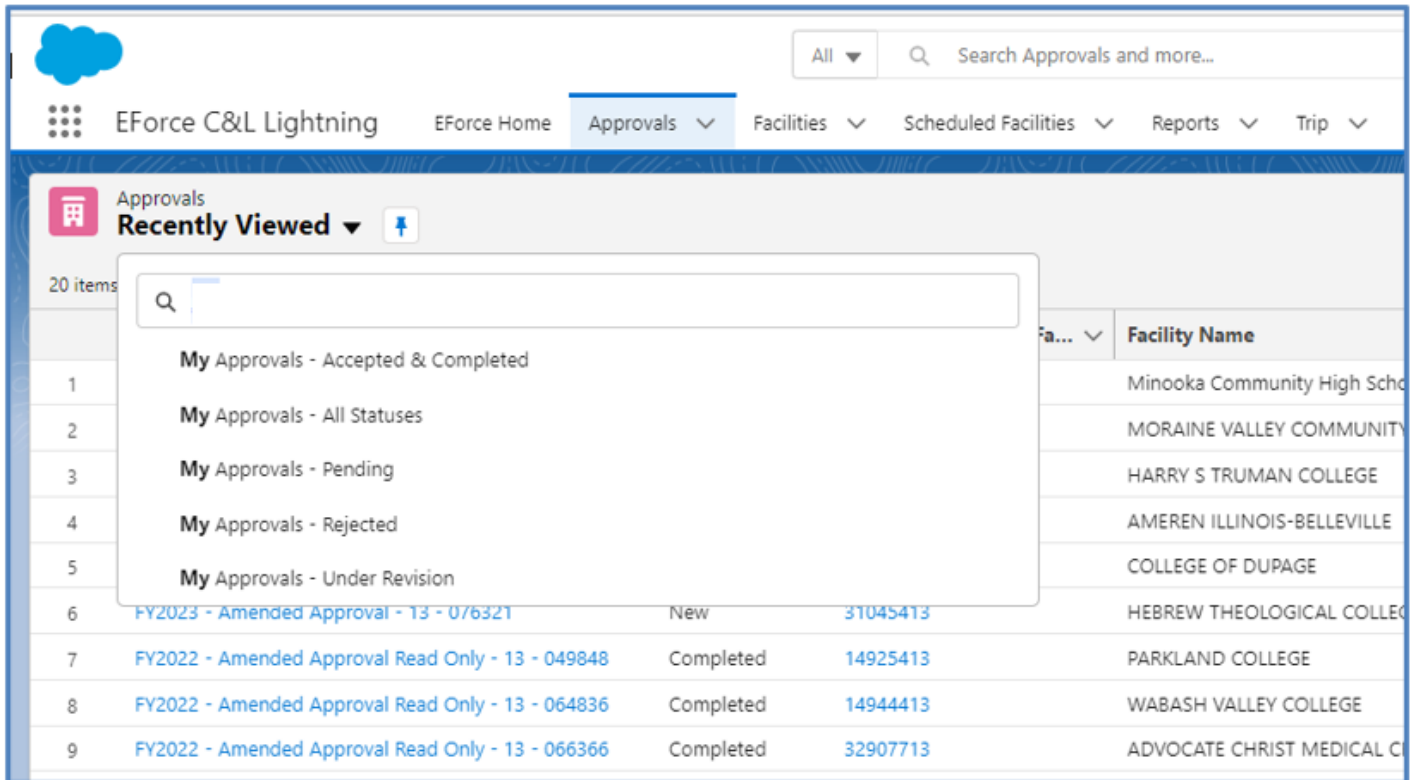
The screenshot shows the Salesforce interface for the 'Approvals' tab. The navigation bar includes 'EForce C&L Lightning', 'EForce Home', and a dropdown menu with 'Approvals' selected. Below the navigation bar, the page title is 'IL - Approvals - Pending'. The main content area displays a table of approvals with the following columns: Record Type, Approval Name, Approval Status, Facility Code, and Facility Name. The table contains five rows of data, with red arrows pointing to the first and second rows.

Record Type	Approval Name	Approval Status	Facility Code	Facility Name
New Approval	<a href="#">FY2023 - New Approval - 13 - 076781</a>	New		Minooka Community High School
New Approval	<a href="#">FY2023 - New Approval - 13 - 077087</a>	New		Stellar Career College
Amended Approv...	<a href="#">FY2023 - Amended Approval - 13 - 076...</a>	New	20606313	Zurich North America
Amended Approv...	<a href="#">FY2023 - Amended Approval - 13 - 074...</a>	New	30591613	SHEET METAL WORKERS Local 1 JATC
Amended Approv...	<a href="#">FY2023 - Amended Approval - 13 - 075...</a>	New	30593813	UNITED UNION OF ROOFERS WATER

# Program Approvals

## Queues

Approval records will be routed to Queues (*known as lists in Salesforce*) based on their state. When accessing the Approvals home page, users will see recently viewed Approval Records. To access several different List View options, users can click on the down arrow next to the Recently Viewed List name.



The screenshot shows the Salesforce interface for 'Approvals'. The top navigation bar includes 'EForce C&L Lightning', 'EForce Home', 'Approvals', 'Facilities', 'Scheduled Facilities', 'Reports', and 'Trip'. The main content area is titled 'Approvals' and shows a 'Recently Viewed' list view. A dropdown menu is open, displaying several list view options: 'My Approvals - Accepted & Completed', 'My Approvals - All Statuses', 'My Approvals - Pending', 'My Approvals - Rejected', and 'My Approvals - Under Revision'. Below the dropdown, a table of approval records is visible, with columns for 'Facility Name' and 'Status'. The table contains several rows of data, including 'Minooka Community High School', 'MORAIN VALLEY COMMUNITY', 'HARRY S TRUMAN COLLEGE', 'AMEREN ILLINOIS-BELLEVILLE', 'COLLEGE OF DUPAGE', 'HEBREW THEOLOGICAL COLLEGE', 'PARKLAND COLLEGE', 'WABASH VALLEY COLLEGE', and 'ADVOCATE CHRIST MEDICAL C'.

Each list view represents a different queue of Approval Records. In the list view name, the user should see their assigned state, Approvals, and then the different approval status options. This example shows "My Approvals". This option will display all assigned approvals no matter the state. To begin reviewing and accepting approvals, select the "State - Approvals - Pending" list view.

**Accepted & Completed**-Approvals that have been accepted and completed by the ELR.

**All Statuses**-Approvals of all 5 status types will be listed.

**Pending**-Approvals that have been submitted by the SAA awaiting assignment to and/or by the ELR.

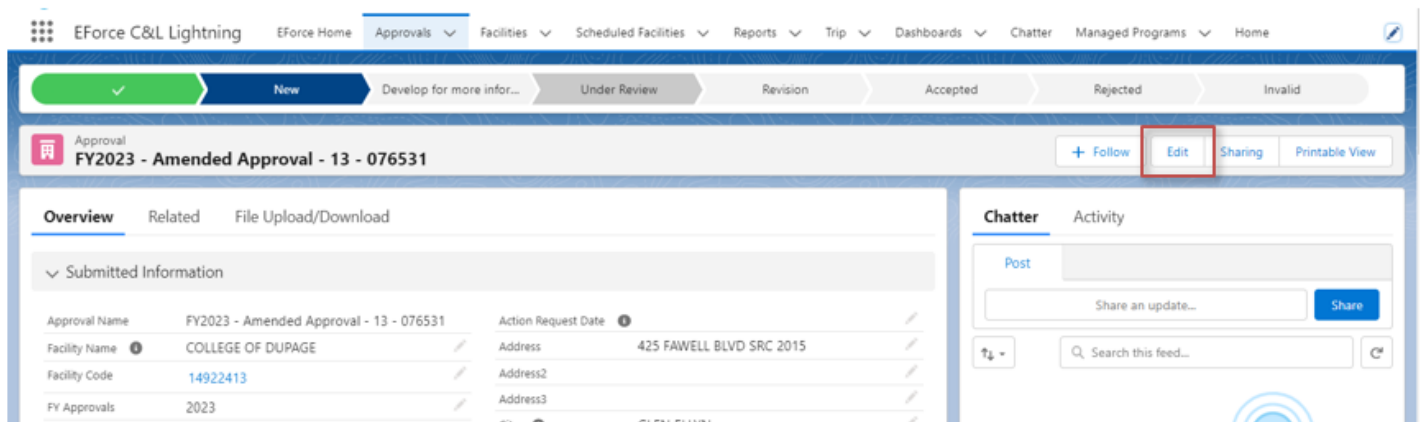
**Rejected**-Approvals that have been rejected by the ELR.

**Under Revision**-Approvals that have been placed under review by the ELR awaiting other actions such as development of more information from the ELR to SAA.

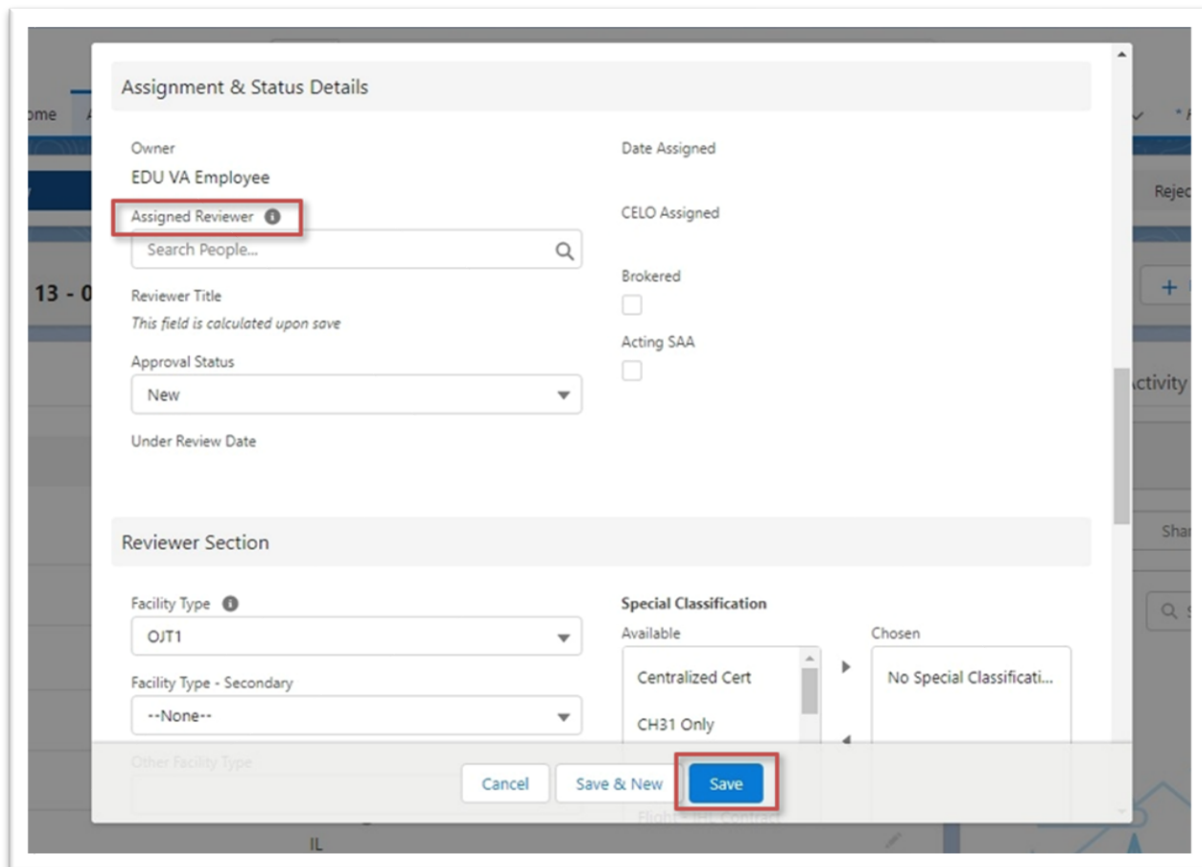
# Program Approvals

## Assigning Approval to Yourself

Select the name of the Approval you plan to work, click **Edit**.



In **Edit** mode, begin typing your name in the **Assigned Reviewer** field. The system will begin searching and return matches to your entry. Click on your name to assign yourself as the reviewer. **Click** save and it will automatically put it in **Under Review** status.



# Program Approvals

## Reviewing Approval Records

Approval Records must be reviewed prior to acceptance. ELRs should review the submitted information files and can complete an ELR Checklist out of system before accepting or rejecting the Approval record.

To review Approval records in their queue (List), click the drop-down arrow on the **Approvals** Home page and select the **My Approvals-Pending** list view. Approvals must be self-assigned first or assigned by your supervisor. See Section on Assigning Approval to Yourself.

The screenshot shows the EForce C&L Lightning interface. The top navigation bar includes 'EForce Home', 'Approvals', 'Facilities', 'Scheduled Facilities', 'Reports', 'Trip', 'Dashboards', and 'Chatter'. The main content area is titled 'Approvals' and shows a dropdown menu for 'IL - Approvals - Pending'. The dropdown menu is open, showing a search bar and a list of options: 'MT - Approvals - Pending', 'MT - Approvals - Rejected', 'MT - Approvals - Under Revision', 'My Approvals - Accepted & Completed', 'My Approvals - All Statuses', 'My Approvals - Pending' (highlighted with a red box), 'My Approvals - Rejected', 'My Approvals - Under Revision', and 'NC - Approvals - Accepted & Completed'. In the background, a table of approval records is visible with columns for Facility T..., Type of Change, Type of Chang..., and Su....

To select an approval record for review, click on the **Approval Name** field in the **My Approvals-Pending** list view.

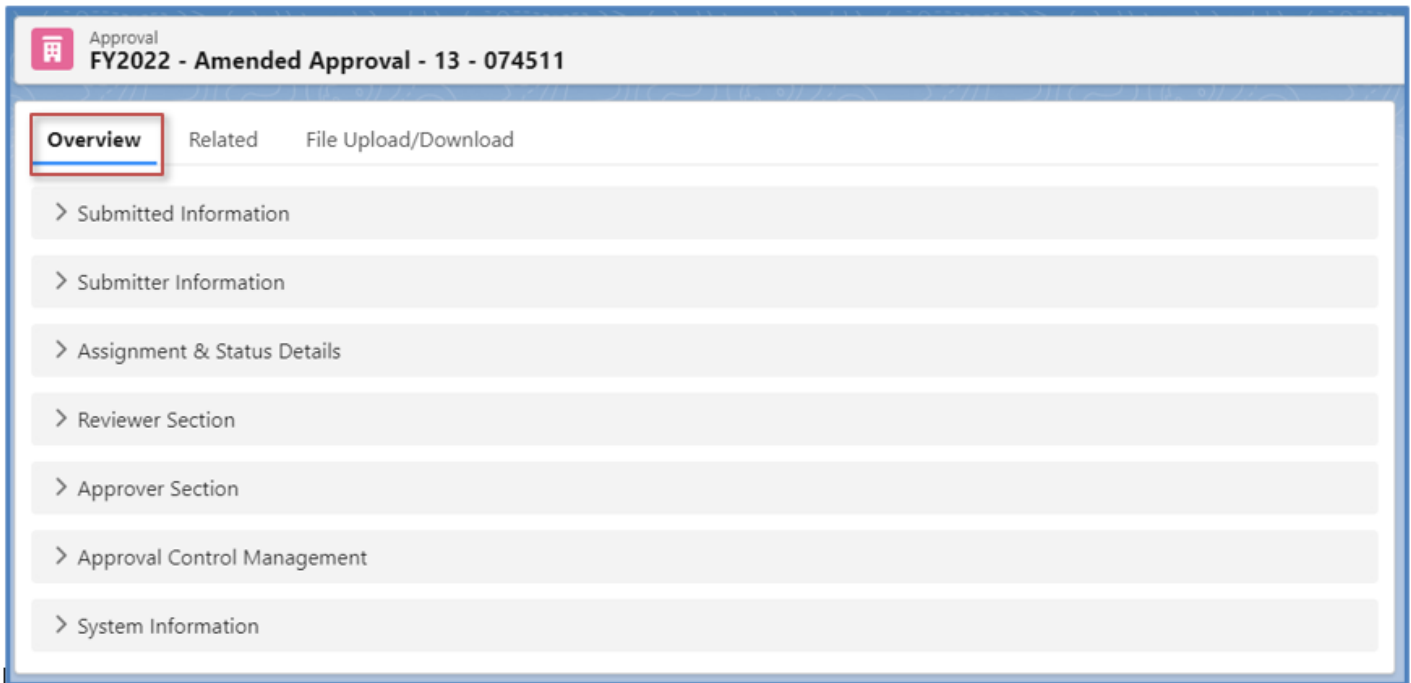
The screenshot shows the EForce C&L Lightning interface with the 'Approvals' section selected. The main content area is titled 'My Approvals - Pending' and shows a search bar and a list of approval records. The table has columns for Record Type, Approval Name, Approv..., Facility..., N..., Facility Name, Fa..., Type of Cha..., Ty..., and Sub... The 'Approval Name' column header is highlighted with a red box. A red arrow points to the 'Approval Name' field of the second record, 'FY2022 - Amended Ap...'. The table contains two rows of data:

Record Type	Approval Name	Approv...	Facility...	N...	Facility Name	Fa...	Type of Cha...	Ty...	Sub...
Amended Approval	FY2022 - Amended Ap...	New	10561113		Hillsboro Police Depart...	OJT1	Change of Scho...		8/16/20
Amended Approval	FY2022 - Amended Ap...	Under Review	10574513		CHAMPAIGN FIRE DE...	OJT1	Wage Scale Cha...		7/20/20

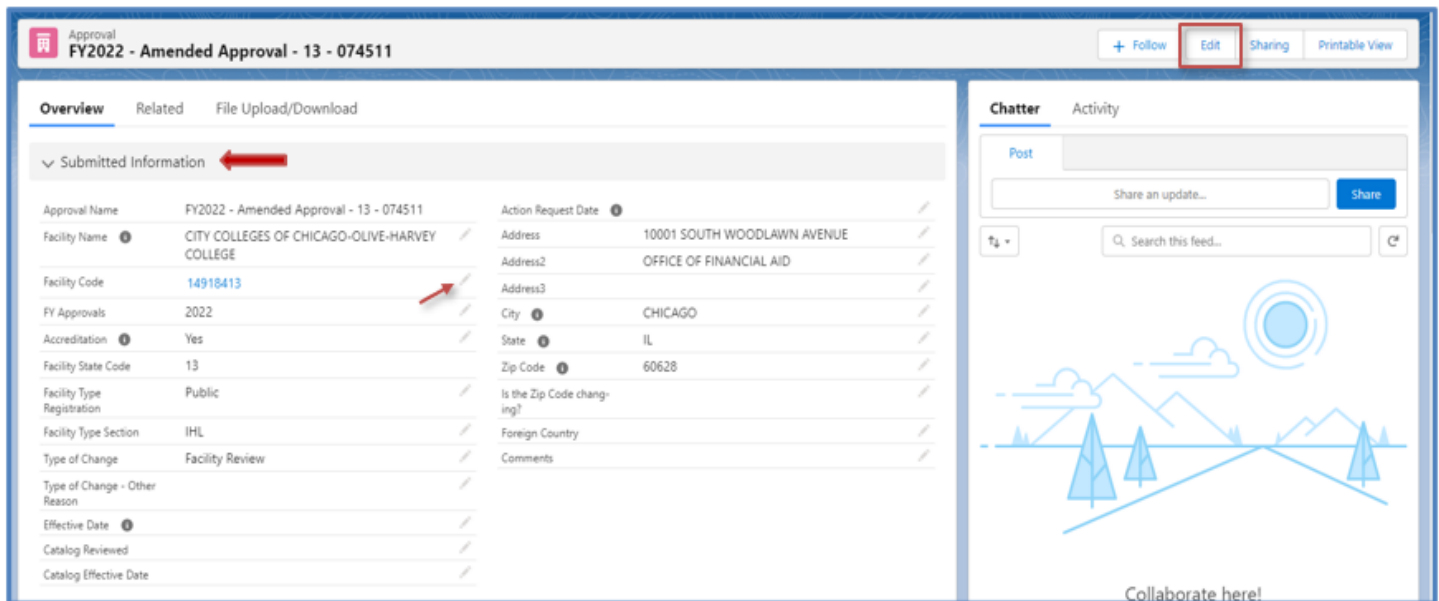
# Program Approvals

## Reviewing Approval Records-Overview Tab

Under the **Overview** tab there are several sections. Each section has different information that is in reference to the Approval process.



The first section is **Submitted Information**. This is information is submitted by the SAA when the Approval is created. All ELRs have the capability to change anything submitted. You can edit the section by the **Edit** button or click the pencil. Be sure to read the Comments section.



# Program Approvals

## Reviewing Approval Records-Overview Tab

The next section is **Submitter Information**. This section shows the submitting SAA's name and title along with the WEST'D Date of the Approval Packet.

Submitter Information ←

Submitted-WEST'd Date	9/29/2022	Submitter Name ⓘ	Tiffany Perry
Submitter's Email Address	tiffany.perry6@va.gov	Submitter Title	IL SAA Central

The following section is **Assignment & Details**. This section shows the information of the assigned ELR and assigner, the date it was assigned and the date it was put under review. It also shows if the Approval is brokered work from another state or submitted by an acting SAA.

Assignment & Status Details ←

Owner	EDU VA Employee	Date Assigned	
Assigned Reviewer ⓘ		CELO Assigned	
Reviewer Title		Brokered	<input type="checkbox"/>
Approval Status	New	Acting SAA	<input type="checkbox"/>
Under Review Date			

The next section is **Reviewer Section**. This section is specific to the facility. Be sure to review and update this section before taking an End Product.


Reviewer Section ←



Facility Type ⓘ	IHL1	Special Classification	No Special Classification
Facility Type - Secondary		Centralized Cert	Main Branch
Other Facility Type			
CELO Region ⓘ	Central		

# Program Approvals

## Reviewing Approval Records-Overview Tab






The following section is **Approver Section**. This section is specific to New Approvals that need facility codes. The ELR created facility code will be typed in the **New Facility Code** box and the **New Facility Code Needed** box will be checked. This section will also display the End Product information after it is taken.

▼ Approver Section 

New Facility Code 	<input type="text"/>	Accepted Date 	<input type="text"/>
New Facility Code Needed?	<input type="checkbox"/>	EP Taken	<input type="text"/>
		EP Date	<input type="text"/>



The following section is **Approval Control Management**. This section shows information after an Approval has been rejected. It also displays control functions, if the approval is locked or unlock, or if it's an abandon draft.

▼ Approval Control Management

Reason for Switch 	<input type="text"/>	Approval Control Status	Unlocked
Develop for More Info Date	<input type="text"/>	Abandon Draft	<input type="checkbox"/>
Revision Date 	<input type="text"/>	Abandonment Date	<input type="text"/>
# of Revisions	0	Invalid Reason 	<input type="text"/>
Rejected Date 	<input type="text"/>		
Comments for Rejection 	<input type="text"/>		
Resubmit Date	<input type="text"/>		

The next section is **System Information**. This section shows who created the Approval, the Account it was created under and when it was last modified.

▼ System Information

Created By	 Tiffany Perry, 9/29/2022 12:20 PM	Last Modified By	 Tiffany Perry, 9/29/2022 12:21 PM
Account	<a href="#">CITY COLLEGES OF CHICAGO-OLIVE-HARVEY COLLEGE</a>		



# Program Approvals

## Reviewing Approval Records-Related Tab

Under the **Related** tab there are several sections. Each section has different information that is in reference to the Approval process.

The screenshot shows the 'Related' tab for a new approval record. The navigation bar includes 'EForce C&L Lightning', 'Eforce Home', 'Approvals', 'Facilities', 'Scheduled Facilities', 'Reports', 'Trip', and 'Dashboard'. The main content area is titled 'Approval FY2023 - New Approval - 13 - 076781' and has tabs for 'Overview', 'Related', and 'File Upload/Download'. The 'Related' tab is active and contains several sections: 'Notes (0)', 'Files (5)', 'Facilities Approval Checklists (0)', 'Facilities (Approval Record) (0)', 'Approvals End Product Credits (0)', 'Quality Reviews (0)', and 'Approval History (9)'. The 'Approval History' section is a table with 9 rows and 6 columns: Date, Field, User, Original Value, and New Value. Below the table is a 'View All' link. At the bottom, there is a section for 'SCO Contacts' with 'Contacts for Parent Account (0)' and a 'New' button.

	Date	Field	User	Original Value	New Value
1	10/28/2022 2:17 PM	Approval Status	Janine Arriola	Draft	New
2	10/28/2022 2:17 PM	Submitted-WEST'd D...	Janine Arriola		10/28/2022
3	10/28/2022 2:17 PM	Submitter Name	Janine Arriola		Janine Arriola
4	10/28/2022 2:17 PM	Owner	Janine Arriola	C&L IL SAA	EDU VA Employee
5	10/28/2022 2:16 PM	Comments	Janine Arriola		
6	10/28/2022 2:15 PM	Created.	Janine Arriola		
7	10/28/2022 2:15 PM	Approval Name	Janine Arriola		a5y3d000000000Qj
8	10/28/2022 2:15 PM	Approval Name	Janine Arriola	a5y3d000000000Qj	FY2023 - New Approval - 13 - 076781
9	10/28/2022 2:15 PM	Owner	Janine Arriola	Janine Arriola	C&L IL SAA

The **Quality Reviews** section shows the results of a quality review. A random approval will be selected and reviewed by a Quality Review Specialist.

The **Approval History** section tracks the major changes made within the Approval.

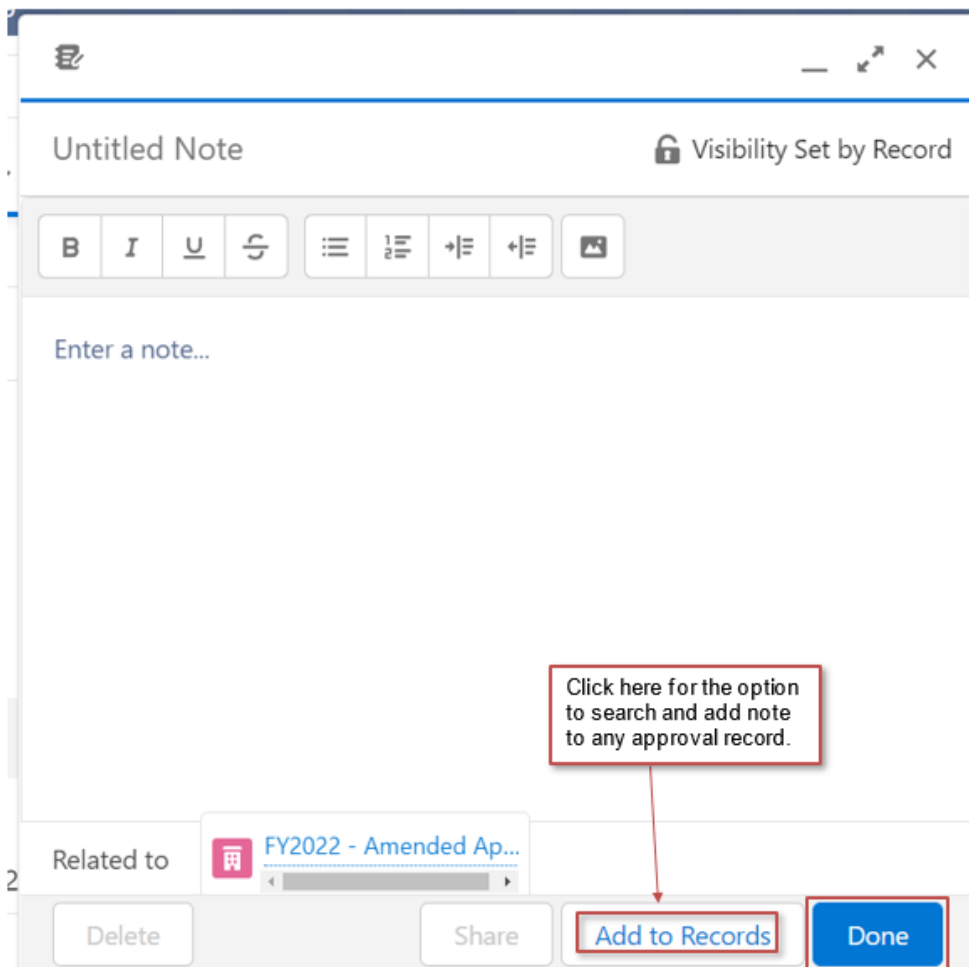
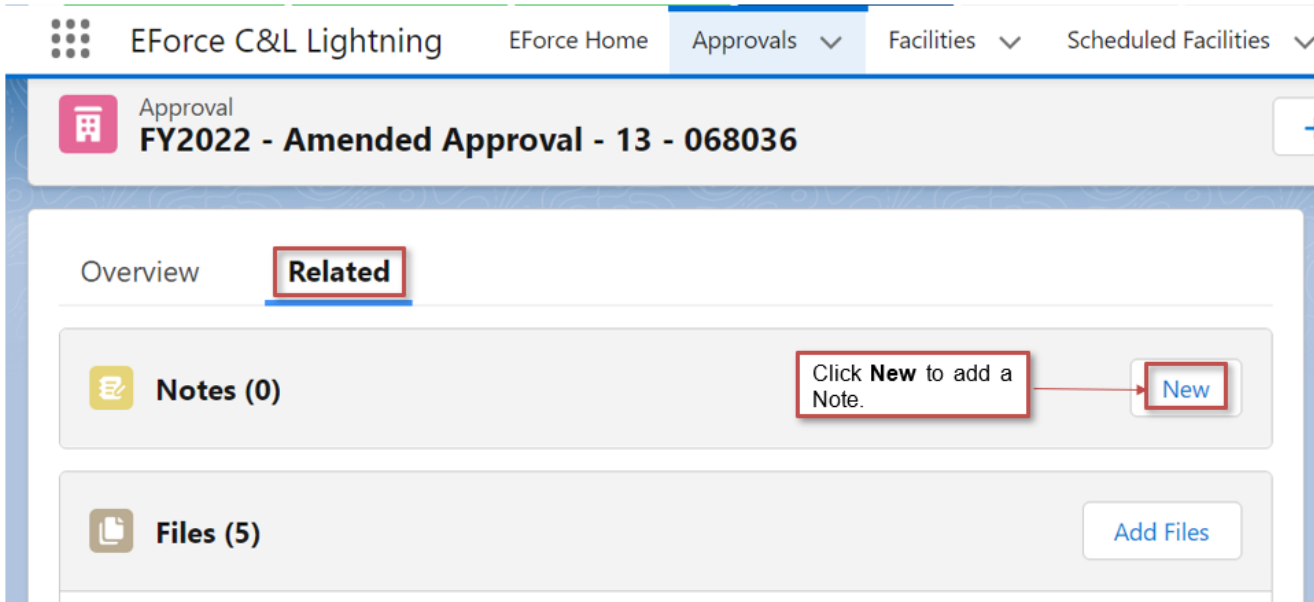
The **SCO Contacts** section shows created SCO contacts for the facility.

The other sections will be discussed throughout the guide.

# Program Approvals

## Creating a Note

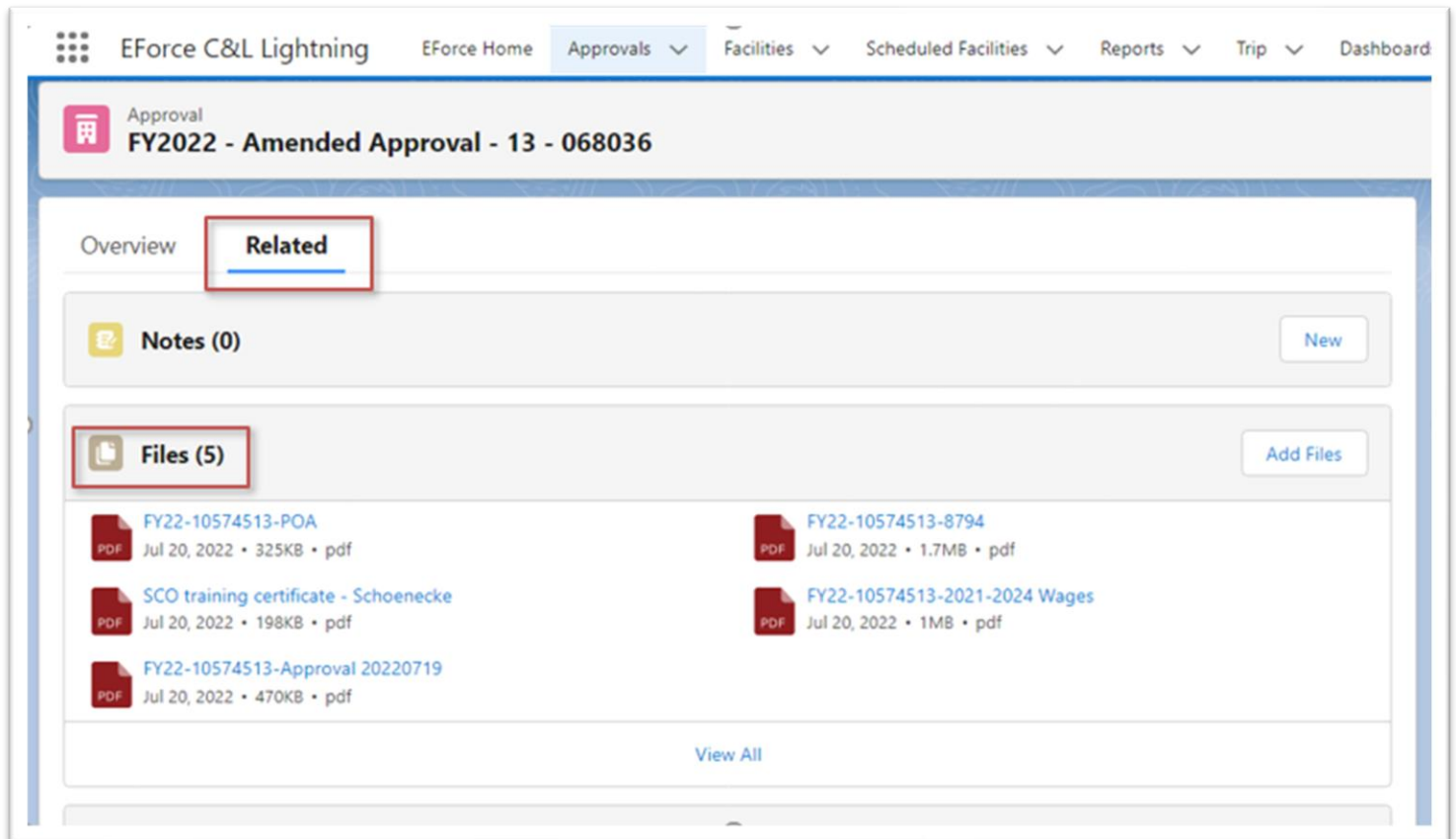
The first section of the **Related** tab is **Note**. A note can be added at any time during a Program Approval review. By default, a note on a record is visible to anyone with access to the record. Click **Done** to save.



# Program Approvals

## File Review

The following section is **Files**. This section contains all the documents submitted by the SAA. You can click on the **Files** name to view the files. Click **View All** to display all the documents. You can click and download each the file individually. There is an option to mass download. See the next page.



The screenshot displays the EForce C&L Lightning interface. At the top, there is a navigation bar with the following items: EForce C&L Lightning, EForce Home, Approvals (selected), Facilities, Scheduled Facilities, Reports, Trip, and Dashboard. Below the navigation bar, the main header shows 'Approval FY2022 - Amended Approval - 13 - 068036'. The interface is divided into two tabs: 'Overview' and 'Related' (which is selected and highlighted with a red box). Under the 'Related' tab, there are two sections: 'Notes (0)' with a 'New' button, and 'Files (5)' with an 'Add Files' button. The 'Files (5)' section contains five file entries, each with a PDF icon, a title, a date, and a file size:

File Name	Date	Size	Format
FY22-10574513-POA	Jul 20, 2022	325KB	pdf
FY22-10574513-8794	Jul 20, 2022	1.7MB	pdf
SCO training certificate - Schoenecke	Jul 20, 2022	198KB	pdf
FY22-10574513-2021-2024 Wages	Jul 20, 2022	1MB	pdf
FY22-10574513-Approval 20220719	Jul 20, 2022	470KB	pdf

At the bottom of the 'Files' section, there is a 'View All' link.

# Program Approvals

## Downloading Documents

### Download Approval Documents

From your **Amended Approval** page, click the Open the **File Upload/Download tab**. Select up to 100 files or 500 MB, download to a zip folder on desktop. Options for selecting files:

#### Select Individual Files:

Navigate to the Files List, select files by clicking the box(s) to the left of the file names/titles, then select download button outlined in red (right side of page), then select **“Download Selected Files”** option from drop down menu.

#### To Select All Files:

Navigate to the Files List, use the roller bar, and scroll to the bottom of the file list. Click the **“!”** button outlined in orange (right side of page) – then select **“Download All Files”** option from drop down menu.

The screenshot shows the EForce C&L Lightning interface. The navigation bar includes 'EForce Home', 'Approvals', 'Facilities', 'Scheduled Facilities', 'Reports', 'Trip', 'Dashboards', 'Chatter', and 'Managed Programs'. The main header is 'FY2022 - Amended Approval - 43 - 057424'. The 'File Upload/Download' tab is active, showing an 'Upload Files' button and a 'File List' section. The 'File List' section contains a table with 6 items. A red box highlights the 'Download All Files' button in the dropdown menu.

UPLOAD BUTTON ON LEFT  
Mass File uploads (add up to 20 files)

Upload Files Or drop files

File List

6 items

	Title	File Extension	Size	Last Modified Date	
1	FY22-25125243-Misc	pdf	3,249,888	03/09/2022, 10:11 AM	⌵
2	FY22-25125243-8794	pdf	835,037	03/09/2022, 10:11 AM	⌵
3	FY22-25125243-Catalog	pdf	1,363,569	03/09/2022, 10:11 AM	⌵
4	FY22-25125243-WorkingCatalog	pdf	7,031,193	03/09/2022, 10:11 AM	⌵
5	FY22-25125243-Approval	pdf	1,412,808	03/09/2022, 10:16 AM	⌵

Download Selected Files  
Download All Files

# Program Approvals

## Creating a New Facilities Checklist

A Facilities Checklist, also known as and ELR Checklist is a tool to assist ELR's when reviewing Approval records. If you do create an ELR Checklist record, it's important to select the appropriate type of Facility the checklist relates to. The fields on the checklist will adjust and apply to the type of facility selected here.

Approval  
FY2022 - Amended Approval - 43 - 057424

Overview **Related** File Upload/Download

Notes (0) New

Files (6) Add Files

- FY22-25125243-CORRECTED APPROVAL LETTER  
Mar 21, 2022 • 335KB • pdf
- FY22-25125243-Approval  
Mar 9, 2022 • 1.3MB • pdf
- FY22-25125243-WorkingCatalog  
Mar 9, 2022 • 6.7MB • pdf
- FY22-25125243-Misc  
Mar 9, 2022 • 3.1MB • pdf
- FY22-25125243-Catalog  
Mar 9, 2022 • 1.3MB • pdf
- FY22-25125243-8794  
Mar 9, 2022 • 815KB • pdf

[View All](#)

Facilities Approval Checklists (0) New

### New Facilities Approval Checklist

Select a record type

- Accredited Schools
- Apprenticeship Programs
- Flight Training Schools
- Non-Accredited Schools
- OJT Programs

Cancel Next

# Program Approvals

## Creating New Facilities Checklist

Be sure to place an X in the ELR Checklist Name field so that EForce C&L can automatically name the record when it is saved. New approval records will not have a Facility Code to link to, but Amended Approval records will.

Complete each section of the checklist and click Save.

### New Facilities Approval Checklist: OJT Programs

---

**Information**

* Facilities Approval Checklist Name <input type="text"/>	OJT Code 38 CFR § 21.4262 <a href="http://www.warms.vba.va.gov/REGS/38CFR/BOOKG/PART21/s21_4262.doc">http://www.warms.vba.va.gov/REGS/38CFR/BOOKG/PART21/s21_4262.doc</a>
* Approval <input type="text" value="FY2022 - Amended Approval - 43 - 057424"/>	Notice of Approval 38 CFR 21.4258 <a href="http://www.warms.vba.va.gov/REGS/38CFR/BOOKG/PART21/s21_4258.doc">http://www.warms.vba.va.gov/REGS/38CFR/BOOKG/PART21/s21_4258.doc</a>

Complete this field.

**Does the letter of "Notice of Approval" contain:**

Date of letter?	<input type="text" value="--None--"/>
Proper name and address of facility?	<input type="text" value="--None--"/>
Legal authority/conditions of approval?	<input type="text" value="--None--"/>
Effective date of approval?	<input type="text" value="--None--"/>
Signature of responsible SAA official?	<input type="text" value="--None--"/>

In addition to the Approval Letter, does

# Program Approvals

## Uploading Documents

### Upload Approval Documents

From your **Amended Approval** page, click the **File Upload/Download** tab, navigate to file location on desktop, select files by using Ctrl button on keyboard and arrow pointing down to highlight the files. Click left button on mouse to Drag the files over **the Upload Files | Or drop files** button until the outline of the button turns blue, release the button on mouse. Only 20 files can be uploaded at a time. You can also click the **Upload Files** button and pull and search the files from your computer.

Approval  
FY2022 - Amended Approval Read Only - 13 - 051349

Overview Related **File Upload/Download**

UPLOAD BUTTON ON LEFT  
Mass File uploads (add up to 20 files)

Upload Files Or drop files

DOWNLOAD MANY FILES  
to your Desktop  
(Click button - Arrow Pointing Down)  
Upload button below is for single file

File List

17 items

	Title	File Extension	Size	Last Modified Date
1	FY22-14903413-1998 SOUTH SUBURBAN C...	pdf	2,985,539	06/25/2022, 08:47 AM
2	FY22-14903413-FINAL ELR Approval Check...	xls	225,792	06/25/2022, 08:48 AM
3	FY22-14903413-850WCLR	pdf	58,899	06/25/2022, 08:52 AM
4	South Suburban College - Other Applicatio...	pdf	98,709	12/07/2021, 10:03 AM
5	South Suburban College - Power of Attorn...	pdf	63,720	12/07/2021, 10:03 AM
6	20211129 Approvals - South Suburban Coll...	pdf	789,826	12/07/2021, 10:03 AM

Using the following naming convention, '**FiscalYear- FacilityCode-DocumentsType**', upload scanned or electronic documents into EForce C&L. For example: "FY2022-FacilityCode-ELR Checklist"; for use, "FY2022-FacilityCode-SCO Cert-xxxx" (xxxx=SCO last name). See next page for more examples. Tip: Edit file names according to the naming convention prior to uploading the file.

# Program Approvals

## Uploading Documents Continued

### Name Approval Files Using the Naming Convention

Use the naming convention guideline, '**FiscalYear-FacilityCode-DocumentsType**', to name files prior to uploading them into EForce C&L. Following are select examples illustrating how to use the naming convention guideline.

Guide	Example
<b>FiscalYear-FacilityCode-SCO certificate-SCO Last Name</b>	<b>FY22-10000038-SCO Certificate-Johnson.doc</b>
<b>FiscalYear-FacilityCode-ELR Checklist.pdf</b>	<b>FY22-10370095-ELR Checklist.pdf</b>
<b>FiscalYear-FacilityCode-VA Form 22-1998</b>	<b>FY22-12034201-VA Form 22-1998.pdf</b>



### HINTS & TIPS

Using the above naming convention, name your files in advance of uploading into EForce C&L. To upload more than one file at a time, click on the first file and then press and hold the Ctrl key. While holding down the Ctrl key, click each of the other files you want to upload. If multiple files are grouped together, click on the first file, press, and hold the Shift key, and then click on the last file. All files in that group will be selected to upload at one time.



# Program Approvals

## Updating Approval Status

Once the attached file has been reviewed, the ELR can update the Approval record to reflect a final status of Accepted, Rejected, or another option below. In **Edit** mode under the **Reviewer Section**, review all the information. The **Special Classification** must be addressed as one of the **Available** listed classifications or as **No Special Classification**.

Reviewer Section

Facility Type **Select facility type.**

OJT1

Facility Type - Secondary

--None--

Other Facility Type

CELO Region **Central**

Special Classification

Available

Centralized Cert

CH31 Only

Federal

Flight - IHL Contract

Chosen

No Special Classificati...

Centralized Cert Main Branch

--None--

Cancel Save & New Save

- **Draft**– Not submitted to VA yet
- **New**- Submitted to VA, not yet touched by VA reviewer
- **Under Review**–Reviewer has taken ownership
- **Develop for More Information**– Reviewer has returned to Submitter
- **Revision**–Submitter is resubmitting with additional information
- **Accepted**- Reviewer has accepted the Approval package – just needs to have EP taken to move for the Approval to move to completed status)
- **Rejected**-Reviewer is rejecting the submittal. This is the end.
- **Invalid**-Supervisor has moved any erroneous or duplicate approval you might want to remove these from your quarterly status.

Submitted-WEST'd Date

3/9/2022

Submitter Name

Clarence Court

Submitter's Email Address

clarence.court@va.gov

Submitter Title

TX SAA Central

This field is calculated upon save

Status

--None--

Draft

New

Develop for more information

✓ Under Review

Revision

Accepted

Rejected

Invalid

Under Review

Under Review Date

9/21/2022

Reviewer Section

Facility Type

NCD2

Special Classification

Available

Chosen

Facility Type - Secondary

--None--

Cancel Save & New Save

# Program Approvals

## Updating Approval Status-Accepted

For Amended Approvals when processing VA-Form 22-8794, it is expected to be accepted. In **Edit** mode, under **Approval Status** select **Accepted** and click **Save**.

Assignment & Status Details

Owner  
EDU VA Employee

Assigned Reviewer ⓘ  
Search People... 🔍

Reviewer Title  
*This field is calculated upon save*

Approval Status  
Accepted

Under Review Date

Date Assigned

CELO Assigned

Brokered

Acting SAA

Reviewer Section

Facility Type ⓘ  
OJT1

Facility Type - Secondary  
--None--

Other Facility Type

Special Classification

Available

- Centralized Cert
- CH31 Only

Chosen

- No Special Classificati...

Cancel Save & New Save



### HINTS & TIPS

The approval must be put Under Review 1<sup>st</sup> before it can be accepted. If you have not done this already, please see Step 2 of Processing a VA Form 22-8794.

# Program Approvals

## Updating Approval Status-Rejected

If this approval is rejected, do not enter new Facility Code, or click on the Create New Record with New Facility Code checkbox.

The screenshot shows the 'Assignment & Status Details' section of a form. The 'Owner' is 'EDU VA Employee'. The 'Assigned Reviewer' field has a search box with 'Search People...' and a magnifying glass icon. The 'Reviewer Title' is 'ELR Central' with a note 'This field is calculated upon save'. The 'Approval Status' dropdown menu is highlighted in yellow and set to 'Rejected'. A red box with an arrow points to the dropdown arrow, containing the text: 'Click the arrow for the drop-down menu and select Rejected.' Another red box with an arrow points to the 'Assigned Reviewer' field, containing the text: 'Your name should already be assigned here.' At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'.

Scroll down and you must enter a reason for the rejection in the **Comments for Rejection** field under the **Approval Control Management** section. Click **Save**.

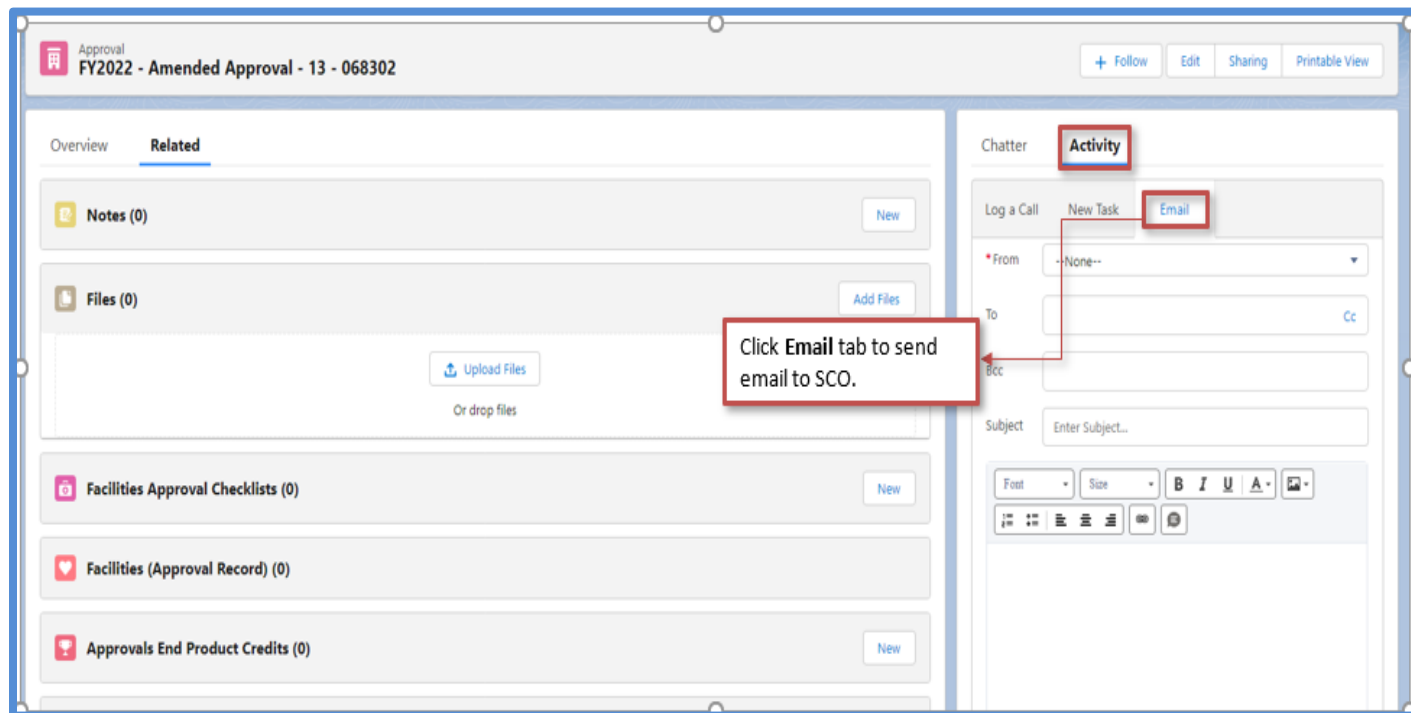
The screenshot shows the 'Approval Control Management' section of a form. It includes fields for 'Reason for Switch', 'Develop for More Info Date', 'Revision Date', '# of Revisions' (0), 'Rejected Date', 'Approval Control Status' (Unlocked), 'Abandon Draft' (checkbox), 'Abandonment Date', and 'Invalid Reason'. The 'Comments for Rejection' field is highlighted with a red box and has a red arrow pointing to it from a red box containing the text: 'Must provide a reason for rejection.' At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'.

# Program Approvals

## Sending Email to SCO

### Send an Email from the Activity Panel

From the **Amended Approval** detail page, navigate to the right, to the **Activity** Panel, and click **Activity**. In the **Email** tab send an email to the SCO with updated 8794 information. You can also type the SCO's email or copy and paste it.



# Program Approvals

## Email SCO the VA Approval Notification

### Send an Email with an Attachments

Sending email in EForce C&L is just like using Outlook or any other email application with the added benefit of maintaining all communications in one place, organized by Approvals. Enter all pertinent information as needed. You can select or create an email template, which will auto-populate with data entered elsewhere. Edit the body of the email as needed. Attach files as needed. Your sent emails will display in **Activity History** for each Approval.

**NOTE:** Using Templates are optional and can be created at any time when sending emails. Your VA email will auto-populate in the **Bcc** line.

The image shows a screenshot of the EForce C&L email composition interface. The interface includes fields for 'From', 'To', 'Bcc', and 'Subject'. The 'From' field is populated with 'Deborah Converted ECSS <meriam.abisourour@accenturefederal.com>'. The 'Bcc' field is populated with 'meriam.abisourour@accenturefe...'. The 'Subject' field is empty. Below the fields is a rich text editor with a toolbar. A red box highlights the 'Send' button. A red box highlights the 'Insert, create, or update template' button. A red box highlights the 'Send' button. A red box highlights the 'Send' button. A red box highlights the 'Send' button.

Click on the **Select Template** icon and select among available Lightning Templates.

Click on the paperclip icon to attach files.

Click the **Send** button to send the email.

Showing is a partial list of emails templates to choose from. Non VA employees should use plain text email templates. Use the search function to search for and select your template.

Insert Email Template  
Select a template for: FY2018-18394307

Templates				
(L)NON-JOURNEYMAN NARRATIVE PENDING ...	This is the Compliance and Liaison template used to req...	Tred Curry	2018-04-19	Del
(L)NON-JOURNEYMAN NARRATIVE RECALLED	This is the Compliance and Liaison template used for rec...	Tred Curry	2018-04-19	Del
(L)NON-JOURNEYMAN NARRATIVE REJECTED	This template is used by Compliance and Liaison to send...	Tred Curry	2018-04-19	Del
(L)FACILITY PREPARATORY EMAIL	Notification to SCO that their facility has been scheduled...	Tred Curry	2018-04-19	Del
(L)FINDINGS LETTER	This the Compliance and Liaison Findings Letter that is g...	Tred Curry	2018-04-18	Del
(L)NON-JOURNEYMAN NARRATIVE PENDING ...	The Compliance and Liaison Narrative Template is used t...	Tred Curry	2018-04-18	Del

**REMEMBER:** Don't forget to enter information in the **Subject**.

# Program Approvals

## Adding Approval End Product Credits

Enter an X into the **EPC# field** so the system can create the number automatically when the record is saved. Select the end product code under **EP Taken** and select the date the credit was earned under **End Product Date**. Review and click **Save**.

If approving a new facility, the record will be created after the EP is taken.

The screenshot shows a web form titled "New Approvals End Product Credit". The form is divided into an "Information" section and a bottom action bar. The "Information" section contains the following fields:

- \* EPC#**: A text input field with a red border and a red outline. Below it is the text "Complete this field." in red.
- Note**: A text area containing the text "PLACE 'X' ABOVE - RECORD NAME WILL AUTO GENERATE".
- \* EP Taken**: A drop-down menu currently showing "--None--". A red box with an arrow points to the drop-down arrow, containing the text "Click the arrow for the drop-down menu and select proper EP."
- \* Approval**: A field showing a selected approval record: "FY2022 - Amended Approval - 13 - 068302" with a red icon on the left and a close button (X) on the right.
- \* End Product Date**: A date picker field with a calendar icon. A red box with an arrow points to the calendar icon, containing the text "Select the date from the popup calendar."

At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is highlighted with a red box.

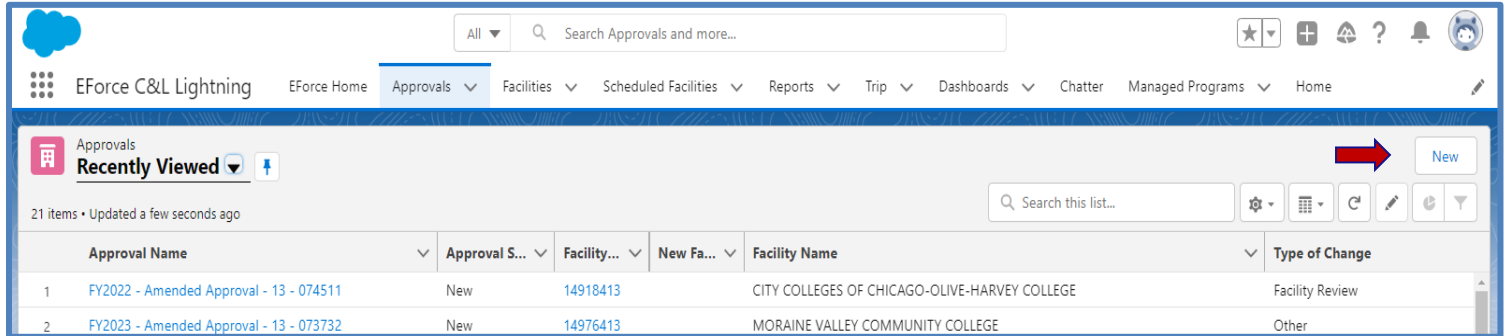
Once saved, the Approval Control Status will update automatically to **Locked**, so that no additional changes can be made to this approval record. The accepted date is populated automatically. The user should then send a notification email using the correct template to the SAA/SCO.

# Processing a VA From 22-8794

# Processing a VA Form 22-8794

## Step 1: Creating a New Amended Approval Record

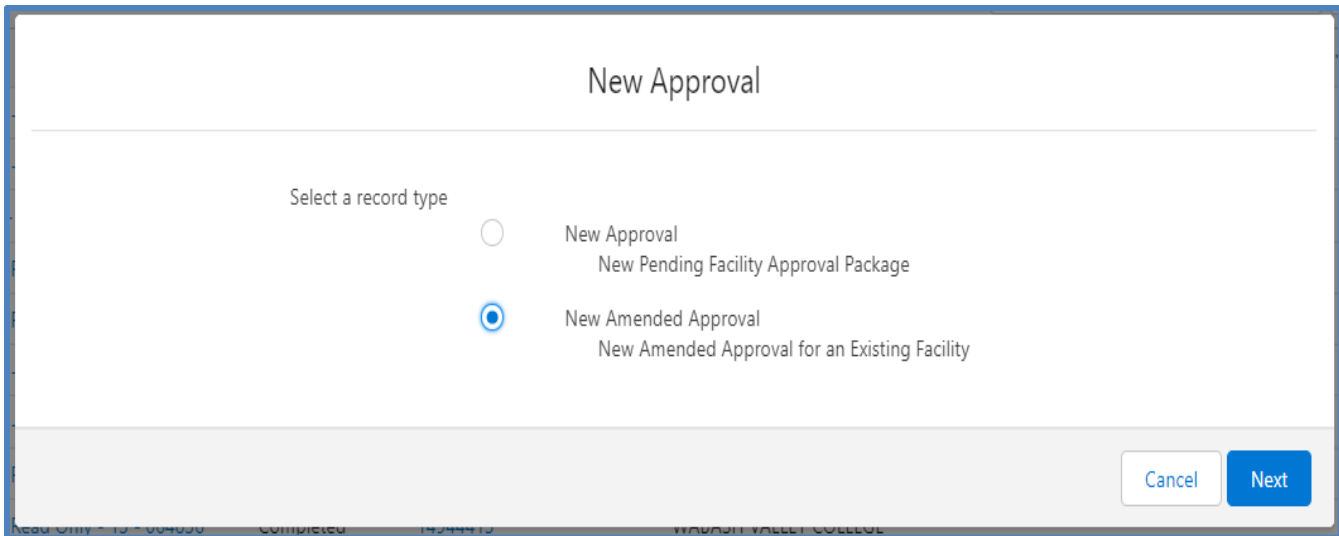
On the **Approvals** Tab, click on the **New** button to create a new Approval Record. Users that do not have the ability to create new approval records will not see the Approvals tab.



The screenshot shows the EForce C&L Lightning interface. The top navigation bar includes 'EForce C&L Lightning', 'EForce Home', 'Approvals', 'Facilities', 'Scheduled Facilities', 'Reports', 'Trip', 'Dashboards', 'Chatter', 'Managed Programs', and 'Home'. The 'Approvals' tab is active, showing a 'Recently Viewed' section with a 'New' button highlighted by a red arrow. Below this is a table with columns: Approval Name, Approval S..., Facility..., New Fa..., Facility Name, and Type of Change. The table contains two rows of data.

	Approval Name	Approval S...	Facility...	New Fa...	Facility Name	Type of Change
1	FY2022 - Amended Approval - 13 - 074511	New	14918413		CITY COLLEGES OF CHICAGO-OLIVE-HARVEY COLLEGE	Facility Review
2	FY2023 - Amended Approval - 13 - 073732	New	14976413		MORAIN VALLEY COMMUNITY COLLEGE	Other

Select the record type. Select **New Approval** if the Facility has never been approved by the VBA before. Select **Amended Approvals** if the Facility had been approved before and already exists in EForce C&L but has changed a significant aspect of their program or staff. Such changes need to be reviewed and approved.



The screenshot shows the 'New Approval' form. The title is 'New Approval'. Below the title is a section labeled 'Select a record type' with two radio button options:

- New Approval  
New Pending Facility Approval Package
- New Amended Approval  
New Amended Approval for an Existing Facility

At the bottom right of the form are two buttons: 'Cancel' and 'Next'.



# Processing a VA Form 22-8794

## Step 1: Creating a New Approval Record

Type in the **Facility Code**. Select the **FY Approvals** year. Select the **Type of Change**. For an VA Form 22-8794 update, click on the down arrow and select **Change of School Certifying Official**. Click **Save**.

Sandbox: Staging

### New Approval: New Amended Approval

Submitted Information

\* Facility Code: 10561113

\* FY Approvals: 2022

\* Type of Change: Change of School Certifying Official

Approval Status: Draft

Reason for Switch: [Text Field]

Is the Zip Code changing?: --None--

Type of Change - Other Reason: [Text Field]

System Information

Created By: [Text Field] Last Modified By: [Text Field]

Buttons: Cancel, Save & New, Save

Callout: Click Save to save your data.

Review data after **Save** to make sure information is correct. Click **Submit**.

Sandbox: Staging

EForce C&L Lightning

Approval: FY2022 - Amended Approval - 13 - 068302

Buttons: + Follow, Submit, Edit, Sharing, Abandon, Printable View

Overview

Submitted Information

Field	Value
Approval Name	FY2022 - Amended Approval - 13 - 068302
Facility Name	Hillsboro Police Department
Facility Code	10561113
FY Approvals	2022
Accreditation	No
Facility State Code	13
Facility Type Registration	Public
Facility Type Section	OJT
Type of Change	Change of School Certifying Official
Action Request Date	[Text Field]
Address	447 S. Main St.
Address2	[Text Field]
Address3	[Text Field]
City	Hillsboro
State	IL
Zip Code	62049
Is the Zip Code changing?	[Text Field]
Foreign Country	[Text Field]

Chatter

Activity

Post: [Text Field]

Share an update... [Share]

Search this feed...

# Processing a VA Form 22-8794

## Step 2: Self Assigning an Approval

While still in the **Amended Approval**, click **Edit**.

The screenshot shows the Force C&L Lightning interface. At the top, there are navigation tabs: Draft, New, Develop for more informat..., Under Review, Revision, Accepted, and Rejected. The current record is titled "Approval Y2022 - Amended Approval - 13 - 068302". In the top right corner, there are buttons for "+ Follow", "Submit", "Edit", and "Sharing". The "Edit" button is highlighted with a red box. Below the title, there are tabs for "view" and "Related". The main content area is titled "Submitted Information" and contains a table with the following data:

Field	Value
Approval Name	22 - Amended Approval - 13 - 068302
Name	Brook Police Department
Code	1113
Action Request Date	
Address	447 S. Main St.
Address2	
Address3	

On the right side, there is a "Chatter" section with a "Post" field and a "Share an update..." button. Below that is a search bar labeled "Search this feed...".

In **Edit** mode, begin typing your name in the **Assigned Reviewer** field. The system will begin searching and return matches to your entry. Click on your name to assign yourself as the reviewer. **Click** save and it will automatically put it in **Under Review** status.

The screenshot shows the "Assignment & Status Details" dialog box. The "Assigned Reviewer" field is highlighted with a red box and contains a search icon. Below it is a search bar labeled "Search People...". The "Approval Status" dropdown menu is set to "New". The "Under Review Date" field is empty. The "Reviewer Section" contains the following fields:

- Facility Type: OJT1
- Facility Type - Secondary: --None--
- Special Classification: Available (Centralized Cert, CH31 Only) and Chosen (No Special Classificati...)

At the bottom of the dialog box, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is highlighted with a red box.

# Processing a VA Form 22-8794

## Step 3: Uploading Documents

### Upload Approval Documents

From your **Amended Approval** page, click the Open the **File Upload/Download** tab, navigate to file location on desktop, select files by using Ctrl button on keyboard and arrow pointing down to highlight the files. Click left button on mouse to Drag the files over **the Upload Files | Or drop files** button until the outline of the button turns blue, release the button on mouse. Only 20 files can be uploaded at a time. You can also click the **Upload Files** button and pull and search the files from your computer.

Approval  
FY2022 - Amended Approval Read Only - 13 - 051349

Overview Related **File Upload/Download**

UPLOAD BUTTON ON LEFT  
Mass File uploads (add up to 20 files)

Upload Files Or drop files

DOWNLOAD MANY FILES  
to your Desktop  
(Click button - Arrow Pointing Down)  
Upload button below is for single file

Upload Files Or drop files

**File List**  
17 items

	Title	File Extension	Size	Last Modified Date
1	FY22-14903413-1998 SOUTH SUBURBAN C...	pdf	2,985,539	06/25/2022, 08:47 AM
2	FY22-14903413-FINAL ELR Approval Check...	xls	225,792	06/25/2022, 08:48 AM
3	FY22-14903413-850WCLR	pdf	58,899	06/25/2022, 08:52 AM
4	South Suburban College - Other Applicatio...	pdf	98,709	12/07/2021, 10:03 AM
5	South Suburban College - Power of Attorn...	pdf	63,720	12/07/2021, 10:03 AM
6	20211129 Approvals - South Suburban Coll...	pdf	789,826	12/07/2021, 10:03 AM

Using the following naming convention, '**FiscalYear- FacilityCode-DocumentsType**', upload scanned or electronic documents into EForce C&L. For example: "FY2022-FacilityCode-ELR Checklist"; for use, "FY2022-FacilityCode-SCO Cert-xxxx" (xxxx=SCO last name). See next page for more examples. Tip: Edit file names according to the naming convention prior to uploading the file.

# Processing a VA Form 22-8794

## Step 3: Uploading Documents Continued

### Name Survey Files Using the Naming Convention

Use the naming convention guideline, '**FiscalYear-FacilityCode-DocumentType**', to name files prior to uploading them into EForce C&L. Following are select examples illustrating how to use the naming convention guideline. Tip: Edit file names according to the naming convention guide prior to upload into EForce C&L.

Guide	Example
FiscalYear-FacilityCode-SCO certificate-SCO Last Name	<b>FY22-10000038-SCO Certificate-Johnson.doc</b>
<b>FiscalYear-FacilityCode- VA Form 22-8794</b>	<b>FY22-10370095- VA Form 22-8794.pdf</b>
<b>FiscalYear-FacilityCode-VA Form 22-1998</b>	<b>FY22-12034201-VA Form 22-1998.pdf</b>



### HINTS & TIPS

Using the above naming convention, name your files in advance of uploading into EForce C&L. To upload more than one file at a time, click on the first file and then press and hold the Ctrl key. While holding down the Ctrl key, click each of the other files you want to upload. If multiple files are grouped together, click on the first file, press and hold the Shift key, and then click on the last file. All files in that group will be selected to upload at one time.

# Processing a VA Form 22-8794

## Step 4: Updating Approval Status-Accepted

For Amended Approvals when processing VA-Form 22-8794, it is expected to be accepted. In **Edit** mode, under **Approval Status** select **Accepted** and click **Save**.

Assignment & Status Details

Owner  
EDU VA Employee

Assigned Reviewer ⓘ  
Search People... Q

Reviewer Title  
*This field is calculated upon save*

Approval Status  
Accepted

Under Review Date

Date Assigned

CELO Assigned

Brokered

Acting SAA

Reviewer Section

Facility Type ⓘ  
OJT1

Facility Type - Secondary  
--None--

Other Facility Type

Special Classification

Available

Chosen

Centralized Cert

CH31 Only

No Special Classificati...

Cancel Save & New Save



### HINTS & TIPS

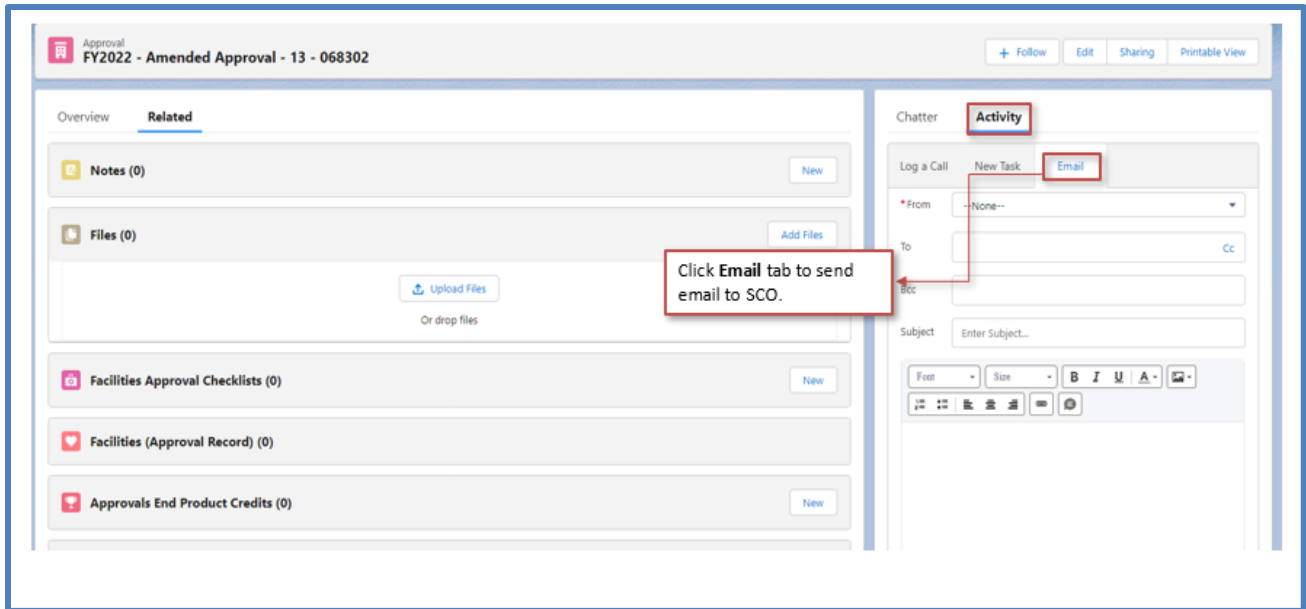
The approval must be put Under Review 1<sup>st</sup> before it can be accepted. If you have not done this already, please see Step 2 of Processing a VA Form 22-8794.

# Processing a VA Form 22-8794

## Step 5: Email SCO the VA Form 22-1998

### Send an Email from the Activity Panel

From the **Amended Approval** detail page, navigate to the right, to the **Activity** Panel, and click **Activity**. In the **Email** tab send an email to the SCO with updated 8794 information. You can also type the SCO's email or copy and paste it.



### Send an Email with an Attachment for the VA Form 22-1998

Sending email in EForce C&L is just like using Outlook or any other email application with the added benefit of maintaining all communications in one place, organized by Approvals. Enter all pertinent information as needed. You can select or create an email template, which will auto-populate with data entered elsewhere. Edit the body of the email as needed. Attach files as needed. Your sent emails will display in **Activity History** for each Approval.

**NOTE:** Using Templates are optional and can be created at any time when sending emails. Your VA email will auto-populate in the **Bcc** line.

**REMEMBER:** Don't forget to enter information in the **Subject**.

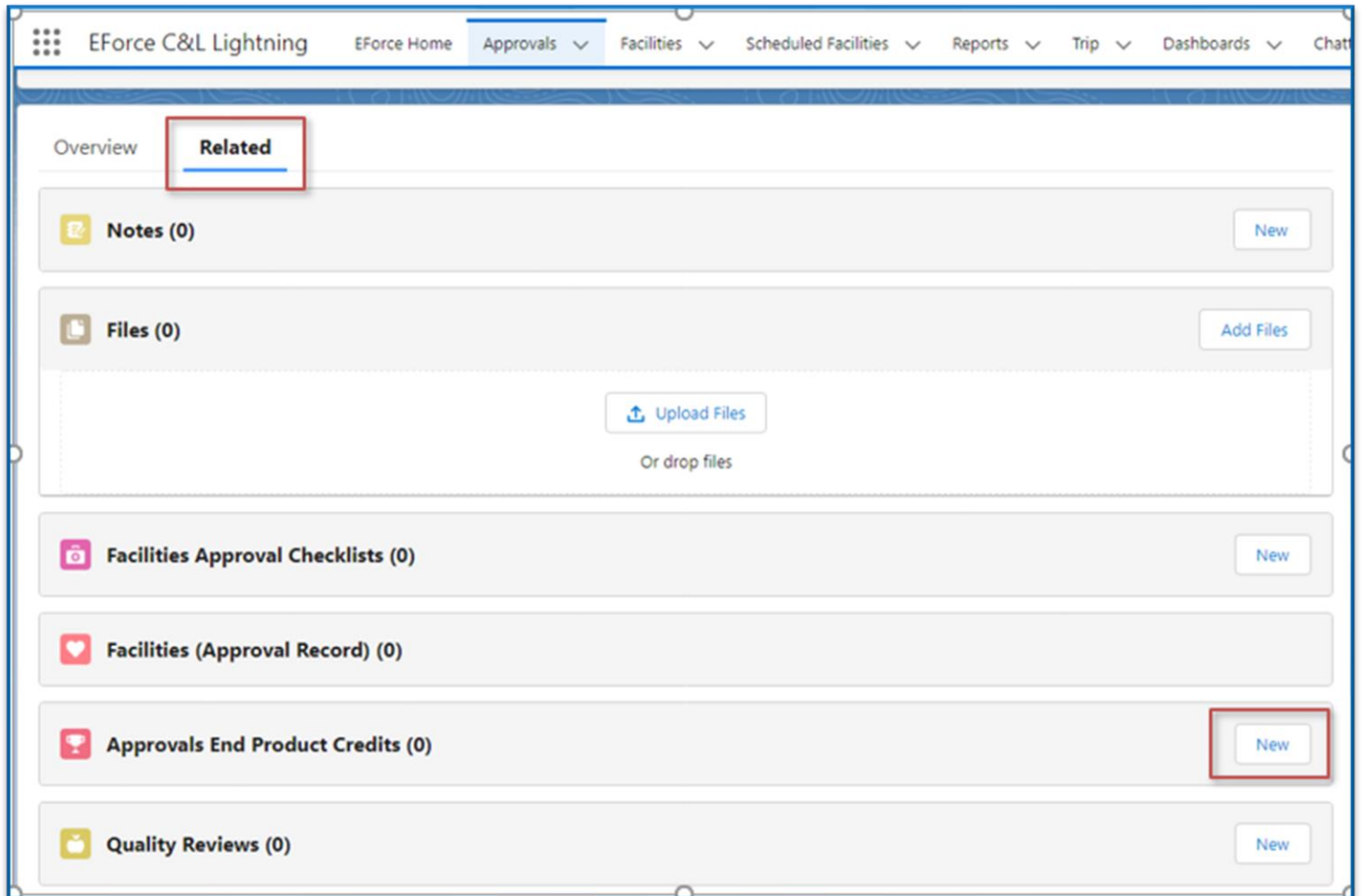


# Processing a VA Form 22-8794

## Step 6: Adding Approval End Product Credits

Approval End Product Credits are the method of tracking work and should only be added to an Approval record after the work has been completed and a decision has been made and recorded. You can find the Approvals End Product Credit related list on the Approval Record by clicking on the **Related Tab**.

Scroll down to the **Approvals End Product Credits** related list and click the **New** button.



# Processing a VA Form 22-8794

## Step 6: Adding Approval End Product Credits

Enter an X into the **EPC# field** so the system can create the number automatically when the record is saved. Select the end product code under **EP Taken** and select the date the credit was earned under **End Product Date**. Review and click **Save**.

The screenshot shows a web form titled "New Approvals End Product Credit" with the following fields and annotations:

- Information** section header.
- \* EPC#**: An empty text input field with a red border and the text "Complete this field." below it.
- Note**: "PLACE 'X' ABOVE - RECORD NAME WILL AUTO GENERATE".
- \* EP Taken**: A dropdown menu currently showing "--None--". A red box with an arrow points to the dropdown arrow, containing the text: "Click the arrow for the drop-down menu and select proper EP."
- \* Approval**: A tag-like input field containing "FY2022 - Amended Approval - 13 - 068302" with a close button (X).
- \* End Product Date**: A date picker input field. A red box with an arrow points to the calendar icon, containing the text: "Select the date from the popup calendar."
- At the bottom, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is highlighted with a red box.

Once saved, the Approval Control Status will update automatically to Locked, so that no additional changes can be made to this approval record. The accepted date is populated automatically. The user should then send a notification email using the correct template to the SAA/SCO.



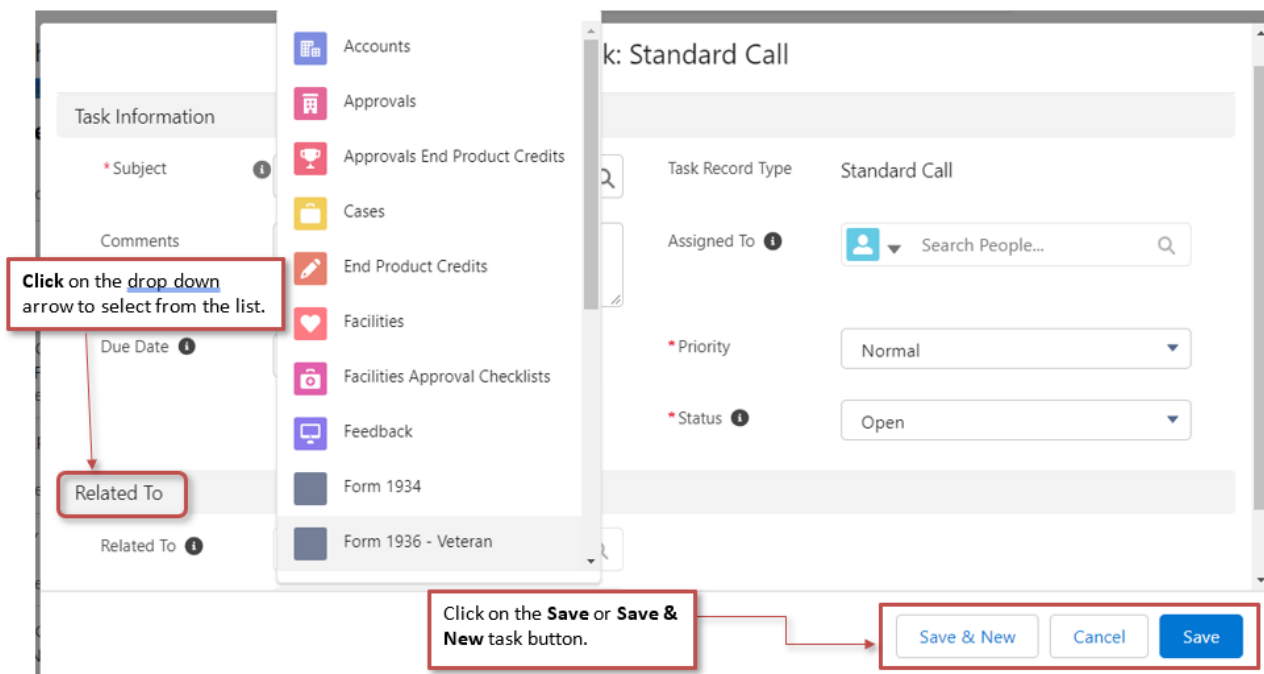
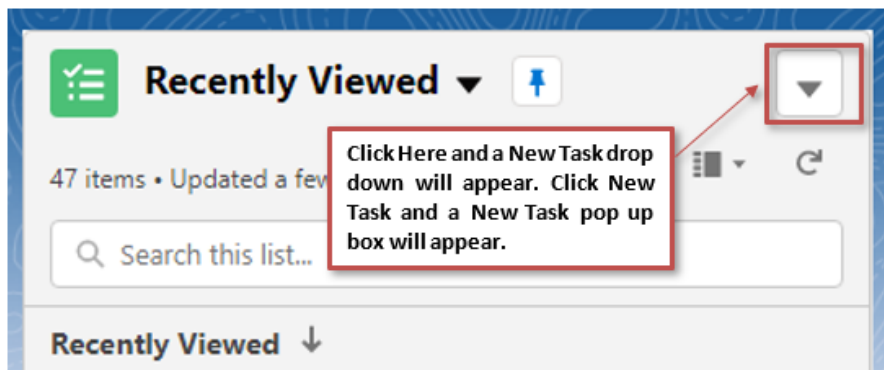
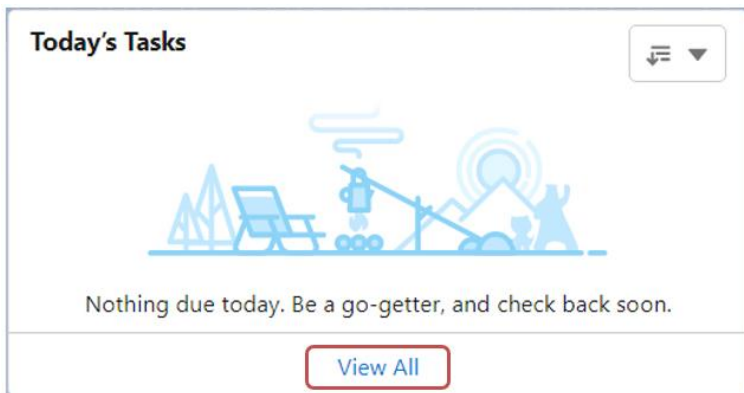
# Other ELR Functions

# Other ELR Functions

## Creating a Task

### Create a New Task Related to an Activity

A **New Task** can be added and associated with a related activity and can include reminders and have files attached. The ability to create a new task can also be done from the **Home** tab. Users should navigate to the bottom of the page, click on **View All** in the **My Tasks Panel**, and a **Recently Viewed** window will appear, then click the drop-down arrow **New Task** button in the upper right.



# Other ELR Functions

## Log a Call or Send Email

### Log a Call or Send an Email from the Activity History

From the **Amended Approval** detail page, under the **Activity** tab; here you can **Log a Call** or **Send an Email**.

The screenshot displays the 'Amended Approval' detail page for 'FY2022 - Amended Approval - 13 - 068036'. The page is divided into two main sections: 'Submitted Information' and 'Activity'.

**Submitted Information:**

Approval Name	FY2022 - Amended Approval - 13 - 068036	Action Request Date	
Facility Name	CHAMPAIGN FIRE DEPARTMENT	Address	307 S RANDOLPH ST
Facility Code	10574513	Address2	
FY Approvals	2022	Address3	
Accreditation	No	City	CHAMPAIGN
Facility State Code	13	State	IL
Facility Type Registration	Public	Zip Code	61820
Facility Type Section	OT	Is the Zip Code changing?	

**Activity:**

The 'Activity' tab is active, showing a 'Log a Call' button highlighted with a red box. Below the button are fields for 'Subject' (containing 'Call'), 'Comments', 'Name' (with a search field 'Search Contacts...'), and 'Related To' (containing 'FY2022 - Amended Approval - 13 - 068036'). A 'Save' button is located at the bottom right of the activity form.

**Callout Box:**

Click on the **Log a Call** button log call information. Click on **Send an Email** to send email to the SCO, for example. Choose among a list of templates.

# Other ELR Functions

## File Search

**Search function in File List** – While in the Amended Approval you can search or filter to a specific word, Title, File Extension, File Size, Last Modified Date. Click on the funnel as indicated by the red arrow. The Quick Filters dialogue box will open. For example, below “8794” is entered in the Search File Content field.

The screenshot shows the 'File List' interface with a table of 6 items. The 'Quick Filters' dialog box is open, and the 'Search File Content' field is populated with '8794'. The 'Apply' button is highlighted in blue.

	Title	File Extension	Size	Last Modified Date
1	FY22-25125243-Misc	pdf	3,249,888	03/09/2022, 10:11 AM
2	FY22-25125243-8794	pdf	835,037	03/09/2022, 10:11 AM
3	FY22-25125243-Catalog	pdf	1,363,569	03/09/2022, 10:11 AM
4	FY22-25125243-Working...	pdf	7,031,193	03/09/2022, 10:11 AM
5	FY22-25125243-Approval	pdf	1,412,808	03/09/2022, 10:16 AM
6	FY22-25125243-CORREC...	pdf	343,221	03/21/2022, 10:57 AM

Click “tab” on keyboard for the Apply button to populate. Notice the next field is highlighted in blue and the Apply button are now displayed. The results, the file with “8794” will appear in the content displays.

The screenshot shows the 'File List' interface with a table of 6 items. The 'Quick Filters' dialog box is open, and the 'Search File Content' field is populated with '8794'. The 'Apply' button is highlighted in blue.

	Title	File Extension	Size	Last Modified Date
1	FY22-25125243-Misc	pdf	3,249,888	03/09/2022, 10:11 AM
2	FY22-25125243-8794	pdf	835,037	03/09/2022, 10:11 AM
3	FY22-25125243-Catalog	pdf	1,363,569	03/09/2022, 10:11 AM
4	FY22-25125243-Working...	pdf	7,031,193	03/09/2022, 10:11 AM
5	FY22-25125243-Approval	pdf	1,412,808	03/09/2022, 10:16 AM
6	FY22-25125243-CORREC...	pdf	343,221	03/21/2022, 10:57 AM

# GLOSSARY

# Glossary of Terms

Following is a Glossary of Terms that you may find helpful when reading through this User Guide:

Term	Description
<b>Activities</b>	<p>E-Force allows you to track your day-to-day activities in the system. Activities can be related back to a specific Facility or Scheduled Facility to help users visualize activity surrounding that record. There are two types of Activities, Tasks and Events.</p> <ul style="list-style-type: none"> <li>• <b>Event:</b> An Event in EForce C&amp;L is similar to a Meeting in Outlook. It's an appointment that a user would like to keep record of in the system. This is a tool used mainly by a CELO, Coach, Supervisor or Manager. Once added to the system, EForce C&amp;L can send reminders to the user who entered the event, and also allows other users who might view the main record to see what meetings have occurred or are going to occur.</li> <li>• <b>Task:</b> A task in E-Force is similar to a "To Do" list item in Outlook. It's something you are responsible for completing at a later date. So, E-Force allows user to enter those tasks into the system and will help the user with reminders and maintenance of To-Do lists. Tasks can be entered and assigned to yourself, or to another user in the system.</li> </ul>
<b>Approvals</b>	<p>SAA Reimbursement Contract require schools and job training establishments desiring approval of programs of education and training to apply to SAAs. The VA reviews the approval notices and subsequent activities and either accepts or rejects them.</p>
<b>Dashboards</b>	<p>Salesforce allows you to create charts and other graphics from your report data. Dashboards are a collection of several report charts/graphs that can be placed on a home page so that certain users see updated charts and graphs for key data whenever they access the system without having to search for and run multiple reports.</p>
<b>End Product Credits</b>	<p>End Product credits are measurements of work required to process claims. End product credits are generated via another system but must be entered into EForce C&amp;L if they exist. Once an End Product Credit is entered and saved on an Approval record in EForce C&amp;L, that record becomes locked, meaning it cannot be edited unless a supervisor unlocks it again. Once revisions are made, your supervisor should change the status to Locked again to prevent further updates.</p>
<b>EForce C&amp;L</b>	<p>EForce C&amp;L is simply the VBA's customized version of Salesforce. The "E" comes from "Education Service" and the "Force" from "Salesforce"</p>

# Glossary of Terms

Following is a Glossary of Terms that you may find helpful when reading through this User Guide:

Term	Description
<b>Facilities</b>	Facilities are organizations, like schools or employers, that provide services to Veterans. These facilities must be approved into the VBA system and are surveyed regularly to ensure compliance with VBA regulations.
<b>List View</b>	Whenever you click on a Tab to view information within an Object in EForce C&L, the system will give you a set of List Views to choose from to view records from that object. Simply put, a List View allows you to view (look at) a list of records. For example, if a user clicks on the Approvals tab, the page will refresh, and the user will see a list of recently viewed Approval records. These are the records this user has most recently viewed when working with Approvals. The user can use the down arrow to select a different list view if they would like to see a different list of Approval records.
<b>Lock/Unlock Files</b>	On an Approval record, there is a Section called Approval Control Management. The key field in that section is Approval Control Status. If that field is set to "Locked" information related to approvals for that Assigned Approval cannot be added or changed. The record is "Locked". Often, the locked status is triggered automatically by entry of specific approval information on the record. For Example, if an End Product Credit is added, the entire Approval Record becomes locked and cannot be edited unless a supervisor unlocks it. Once changes have been made, the supervisor will lock the record again to prevent additional changes.
<b>Objects</b>	Records in EForce C&L are stored in Objects. Objects are similar to column headings an Excel Spreadsheet, but information in one object can be linked to other Objects using a unique ID for each record. You access the information in an object by clicking on Tabs at the top of the screen. The Tab will be labeled with the name of the object. Within objects, a record is represented by a line of information, and different pieces of information are stored in fields, or columns. The main objects in E-Force are: <ul data-bbox="462 1623 803 1770" style="list-style-type: none"><li>• Approvals</li><li>• Facilities</li><li>• Scheduled Facilities</li><li>• Trips.</li></ul>

# Glossary of Terms

Following is a Glossary of Terms that you may find helpful when reading through this User Guide:

Term	Description
<b>Record Profile Page</b>	<p>Once you've accessed a record for an Approval or an Assigned Approval, you will view the Record Profile page. At the top, you will see key information about the record and then you will see two tabs on the profile page - Details and Related.</p> <ul style="list-style-type: none"><li>• The Details tab will display basic information about that record - maybe the name and address of a Facility. The system also tracks who created the record, and when, and who last modified the record, and when. This is information that is collected and stored once for each record.</li><li>• The Related Tab will display other objects that contain information that relate back to the record you are currently viewing. These other, related objects are necessary if there might be multiple instances of the new information, such as Approval records. The longer a Facility stays in the program, the more Approval records will be created and related back to it.</li></ul>
<b>Salesforce</b>	<p>Salesforce is Customer Relationship Management system (or CRM). It allows for tracking of organizations or companies and the people who are related to them. It is a pre-built, base system that allows customers to configure or modify it to suit their needs. VBA has chosen to customize Salesforce to suit their needs, and the result is EForce C&amp;L, or "Education Salesforce".</p>
<b>Tabs</b>	<p>Tabs are the way to access information in the different objects in EForce C&amp;L. You will see tabs across the top of your screen and if you click on them, you will be taken to the home page for that object, which usually displays a list of recent records you've been working in.</p>



