2022

ECSS EForce Training Guide

National Training Team Compliance

Introduction

EForce-C&L Training Guide

Welcome to the Veterans Affairs E*F*orce-C&L Training Guide Lightning Edition!

E*F*orce-C&L

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 compliance surveys at facilities with Veteran and dependent beneficiaries. 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.

E*F*orce-C&L (named for Education Salesforce) was developed as an innovative and sophisticated solution to these problems. E*F*orce-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 latest guide covers the Salesforce User Interface called Lightning.

This guide is intended to introduce you to the E*F*orce-C&L platform, help you understand how it works, and immediately begin using it. Learning any new system can be a complicated and frustrating process. Fortunately, E*F*orce-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 E*F*orce-C&L requires a VBA Domain Active Directory account and VPN access.

E*F*orce-C&L will help you perform compliance surveys quicker, easier, and more mobile than ever before. We hope you enjoy using it and that it helps you serve those who have served us.

- National Training Team-Compliance

Master Table of Contents

Use this Table of Contents to locate the various sections of this Training Guide. At the bottom of the table, refer to individual table of contents for the ECSS user. This section will begin with another Table of Contents specific to the ECSS user and the features and functionality of E*F*orce-C&L that are covered within that section.

Getting Started

Getting Started

Glossary of Terms

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

Term	Description
Activities	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. • **Event**: An Event in EForce 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 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. • **Task**: 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.
Chatter	Chatter is a social network within EForce. On Facilities records, you can post about the facility and even use the "@" to mention a colleague. When you @mention a colleague, your post will show in their chatter feed and the colleague will receive an email notifying them of the post.
Dashboards	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.
End Product Credits	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 if they exist. Once an End Product Credit is entered and saved on a Scheduled Facilities record in EForce, 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.
EForce	EForce is simply the VBA's customized version of Salesforce. The "E" comes from "Education Service" and the "Force" from "Salesforce

Getting Started

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Term	Description
Facilities	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.
List View	Whenever you click on a Tab to view information within an Object in EForce, 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 Scheduled Facilities tab, the page will refresh and the user will see a list of recently viewed Scheduled Facilities records. These are the records this user has most recently viewed when working with Scheduled Facilities. The user can use the down arrow to select a different list view if they would like to see a different list of Scheduled Facilities records.
Lock/Unlock Files	On a Scheduled Facility record, there is a Section called Survey Control Management. The key field in that section is Survey Control Status. If that field is set to "Locked" information related to surveys for that Facility Schedule cannot be added or changed. The record is "Locked". Often, the locked status is triggered automatically by entry of specific survey information on the record. For Example, if an End Product Credit is added, the entire Scheduled Facility 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.
Objects	Records in EForce 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: • **Approvals** • **Facilities** • **Scheduled Facilities** • **Trips**.

Getting Started

Glossary of Terms

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

Term	Description
Record Profile Page	Once you've accessed a record for a Facility or a Scheduled Facility, 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. • 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. • 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 Scheduled Facility records. The longer a Facility stays in the program, the more Scheduled Facility records will be created and related back to it.
Salesforce	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, or "Education Salesforce" .
Scheduled Facilities	As part of the Survey process, Surveyors collect data on a Facility on a regular basis. When it's time for a Facility to be evaluated for Compliance, a Scheduled Facility record is created in Salesforce so that the surveyor can collect and submit all the relevant information for that Survey for that year. Facilities will end up with multiple Scheduled Facility records over time.
Tabs	Tabs are the way to access information in the different objects in EForce. 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.

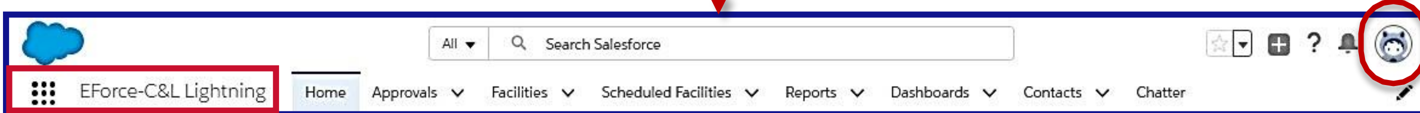
Getting Started

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.**

Global Search allows you to enter a term(s) on which to search all records in Salesforce. See page 10 for more details on searching in Salesforce.

Click on the User Icon to display your name and provide access to your settings.



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: E*F*orce-C&L.

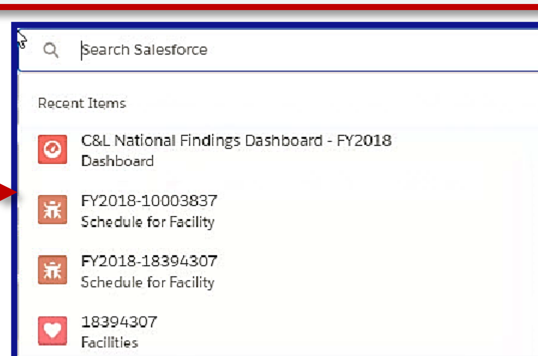
The **Tabs (also known as Objects)** (Facilities, Trip, GSA Vehicles, etc.) appear on every page in Salesforce. Click on a Tab to be taken to that Object's Home page. See page **X** for more details about the Home page of an Object.

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 E*F*orce-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, E*F*orce 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.

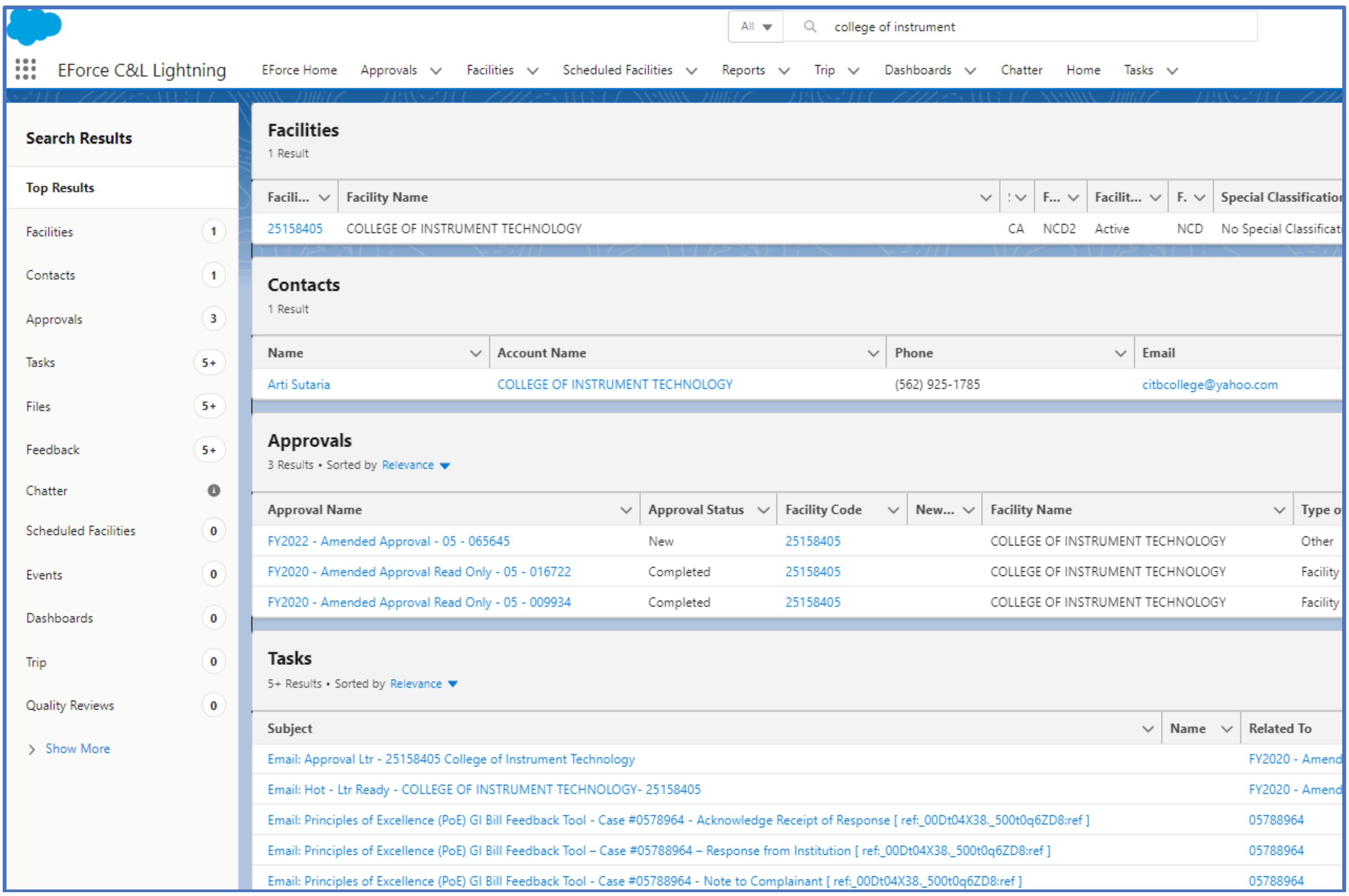


Search Feature	Description
*** Asterisk**	Broaden your search results with the asterisk wildcard. Use ***** to include one or more characters in the search term. For example, searching for **bob jo*** finds records with **Bob Jones** and **Bob Johnson**.
AND	Finds records that match all of the search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

Getting Started

Global Search Results

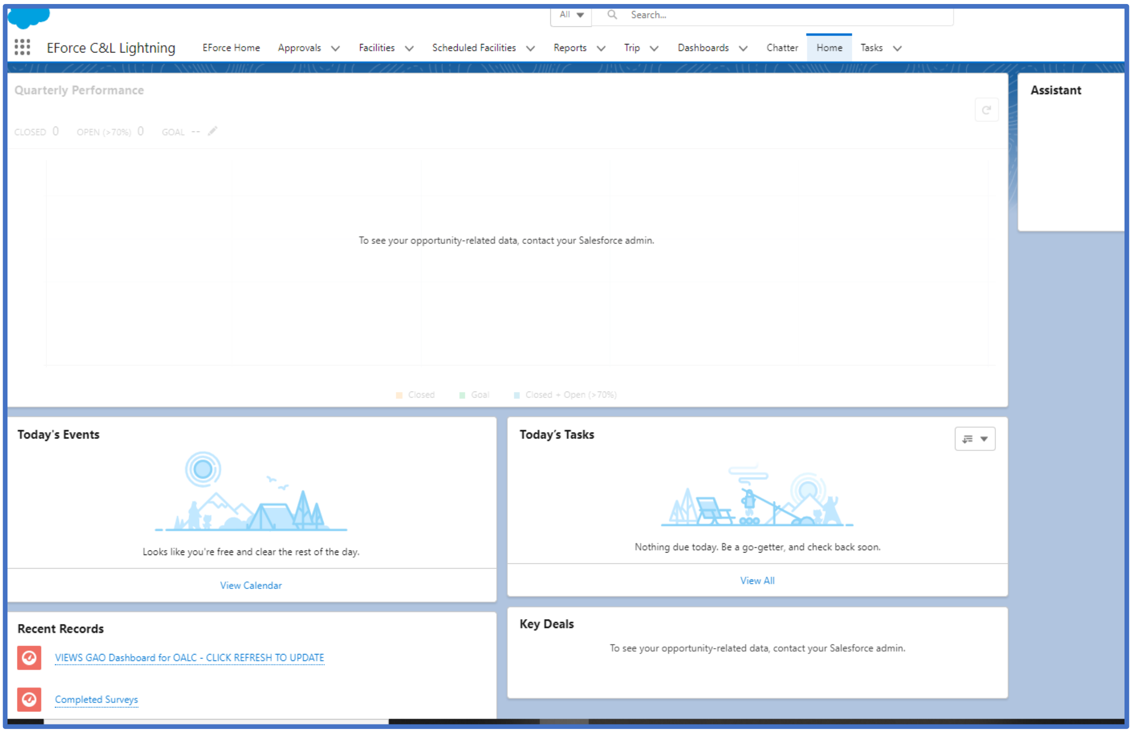
The results of a **Global Search** will display on the **Search Results** page. The page is divided into multiple main sections. The panel section on the left allows you to view the Search Results from each object. To the right of the left panel, the main section displays Records that match the search 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.

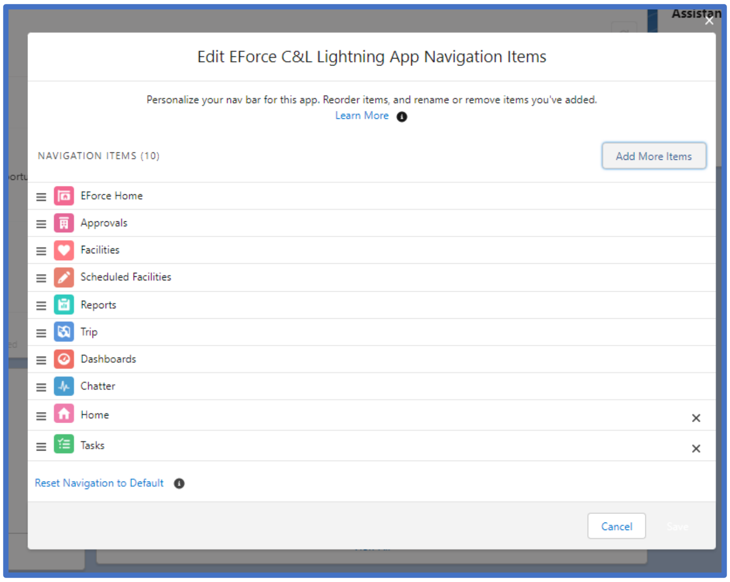


Getting Started

Home Tab Overview

The E*F*orce-C&L Lightning **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, Assistant, Quarterly Performance** and more. Additionally, you can add or remove items on your home screen by clicking the pencil to the right of the home section above **Assistant**.

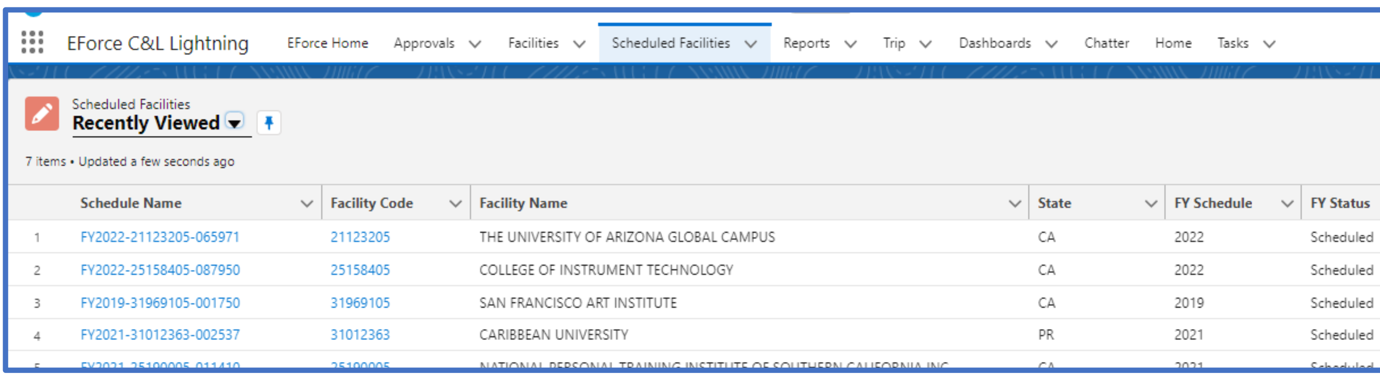


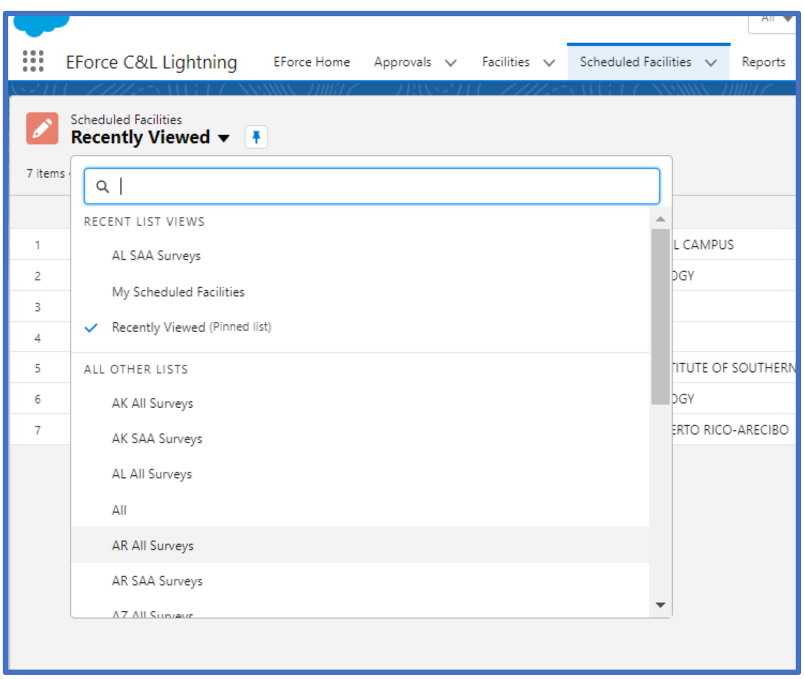


Getting Started

Object Home Pages – List Views

Clicking on the Facilities, Scheduled Facilities, 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 Scheduled Facilities Tab will display the Scheduled Facilities 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 Scheduled Facilities Object will also contain Scheduled Facilities Queues.



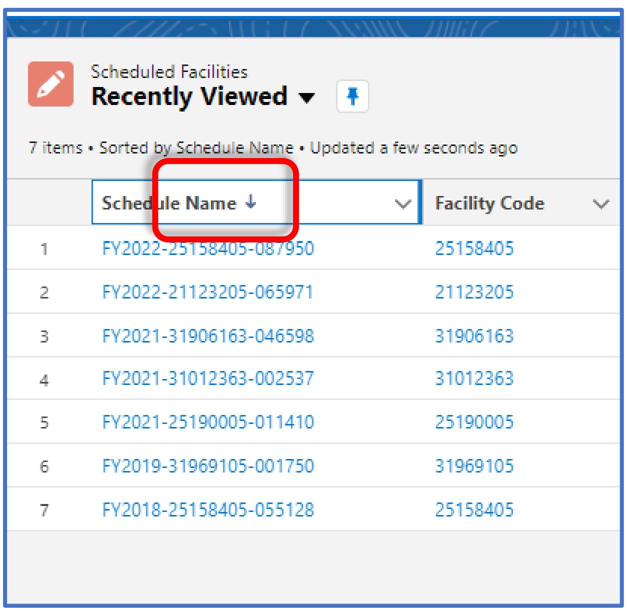


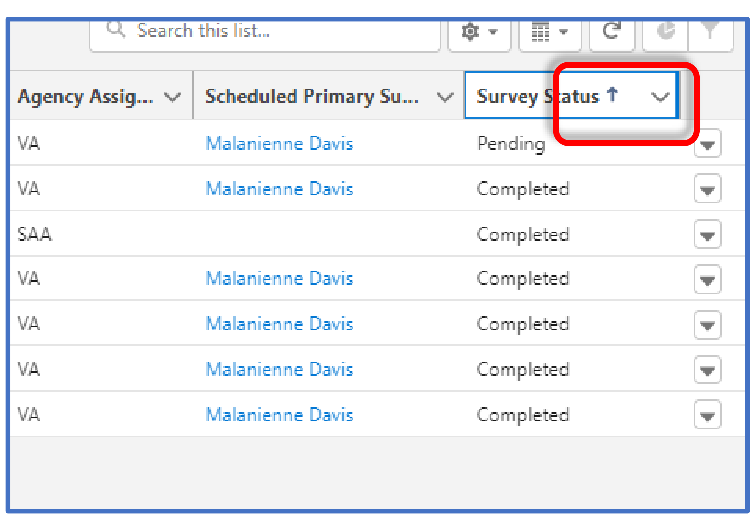
Getting Started

Object Home Pages – Recent Records

Recent Records

Clicking on the Facilities, Scheduled Facilities, GSA Vehicles, Reports, or Dashboards Tabs will display the corresponding Object's Home page. For example, clicking on the Scheduled Facilities Tab will display the Scheduled Facilities Object Home page. Below the List Views of a Home page is the **Recent** records section. The Recent records section displays a list of records from the corresponding Object based on the Recent filter selected. For many Recent sections, the default is set to recently viewed. You can filter each column by clicking the arrow at the top of each column and you can change the default List view by clicking on the list view desired then click the push pin until it stands straight up.



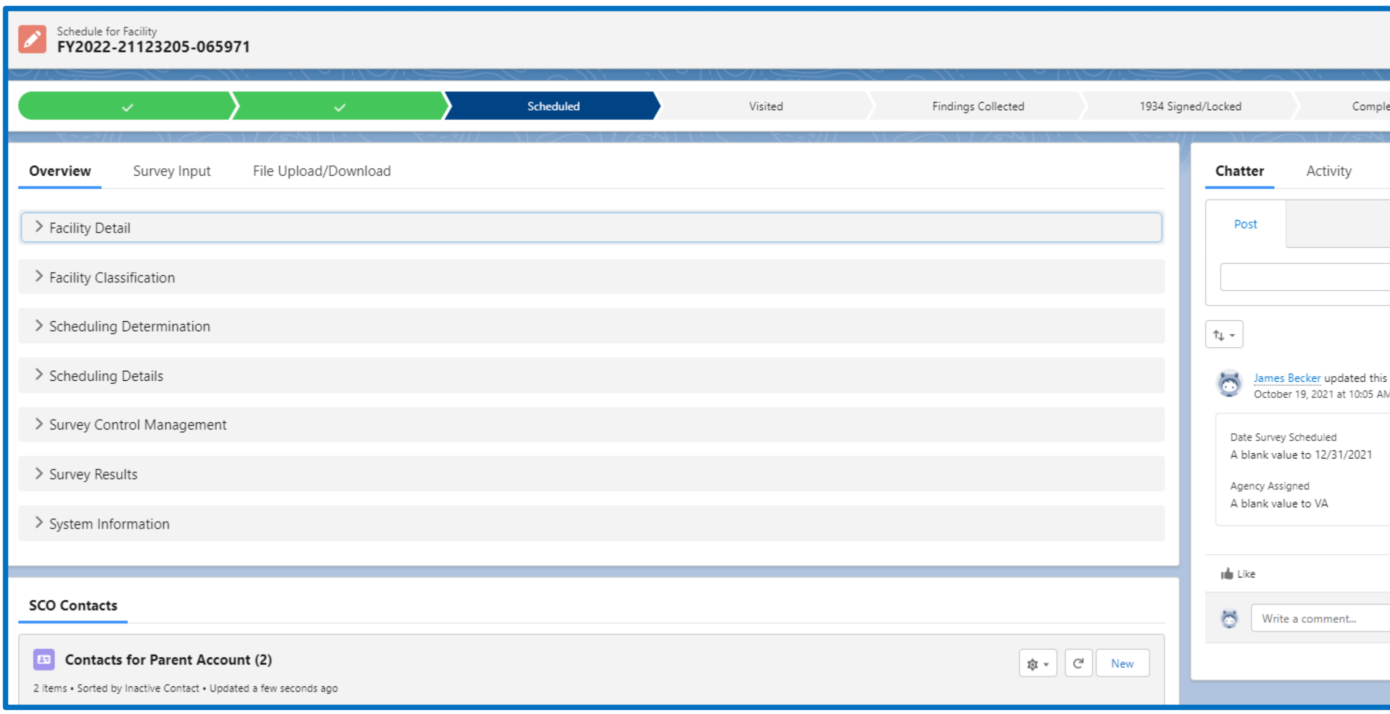


Getting Started

Viewing Records – Overview Tab

Viewing Detail Sections and Related Lists

All records in E*Force*-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. The Overview tab provides informational sections pertinent to that scheduled survey. On this page you can also select Survey Input to enter your survey information and Upload/Download Files.

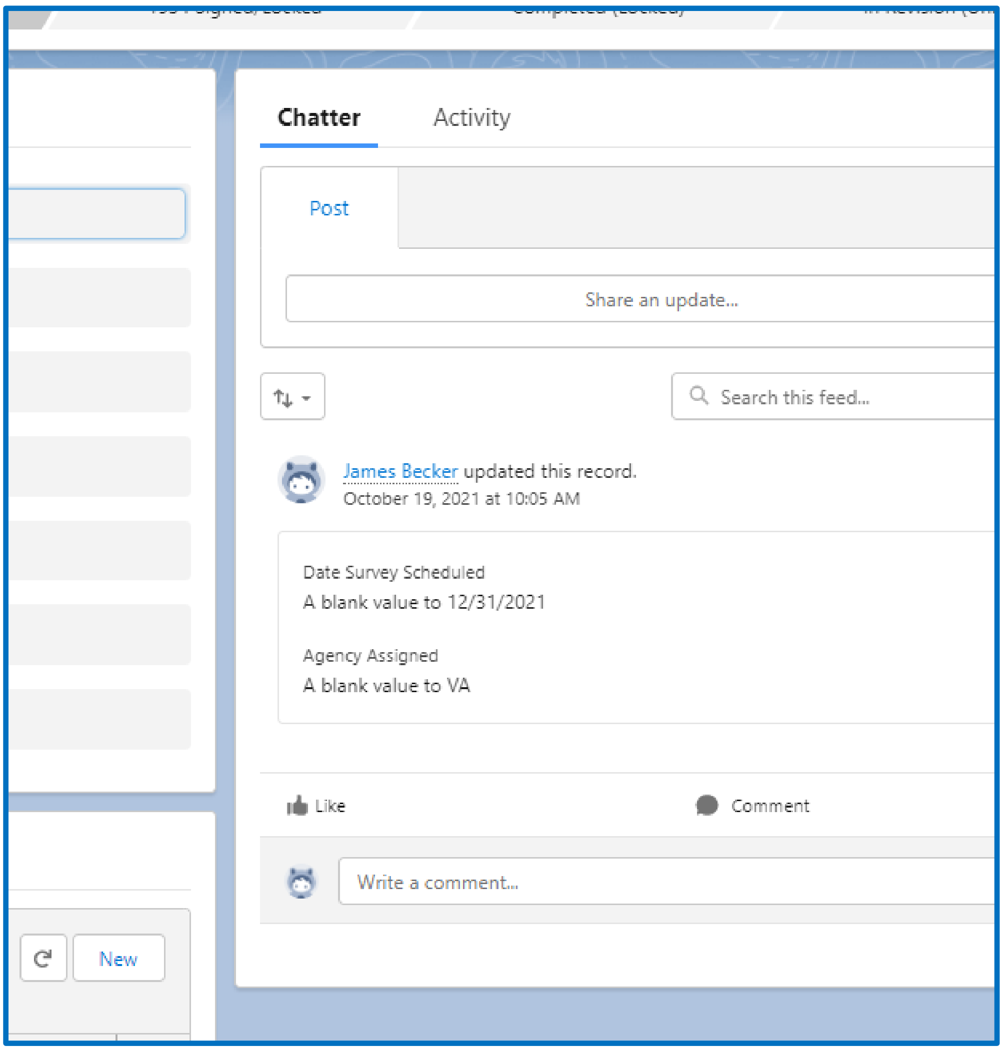


Getting Started

Viewing Records – Chatter Feed View

Chatter Feed View

Almost all records, Scheduled Facilities in particular, in E*F*orce-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.



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.

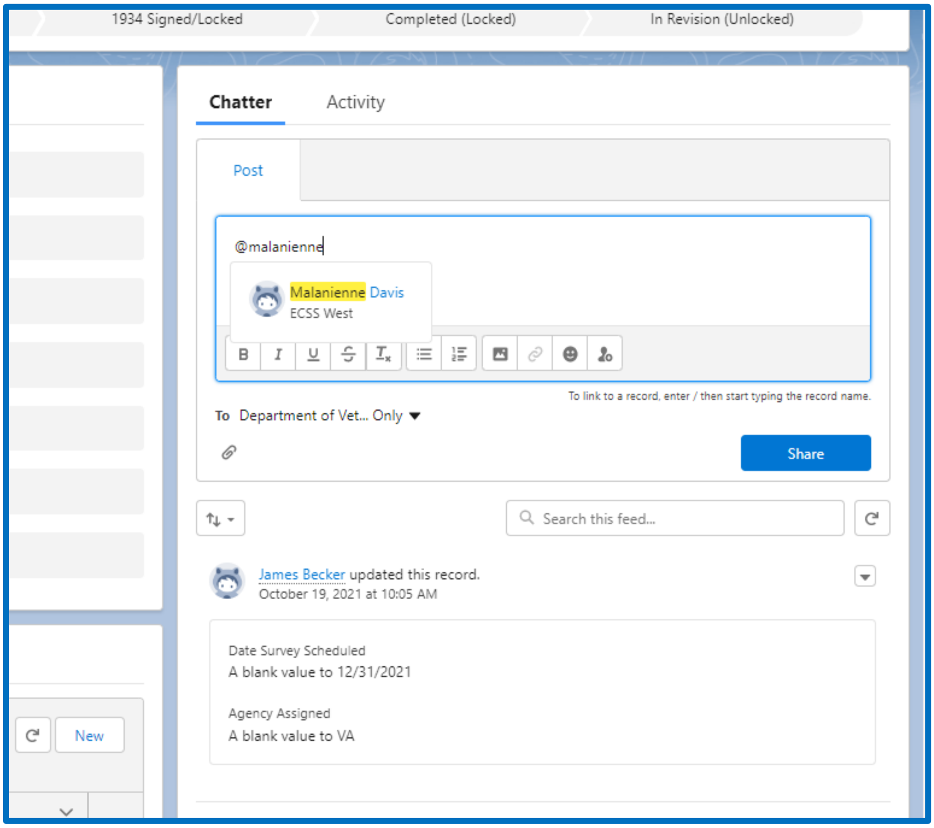
@ “AT”	Use the @ symbol to direct a Chatter Post you make to a specific colleague. The post will then show in your colleague’s Feed as well. E*F*orce-C&L will also send the colleague an email notification with a link to the Post. This will ensure you are able to directly inform any colleagues about information 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

Chatter Feed – Using Chatter Symbols

Create Topic and Direct a Post on the Screen

By including the @ symbol in front of the User's name, this Post will not only appear in your Chatter Feed but it will also appear in the User's Chatter Feed.



Getting Started

Chatter Etiquette: Dos and Don'ts

CHATTER DOs

- Do participate by sharing information; ask and answer questions.
- Do keep your Posts relevant to work.
- Do keep it brief.
- Do Post rather than send a "low-priority" e-mail.
- Do use Chatter to engage a wider audience and get feedback.
- Do Post Files instead of e-mailing attachments.
- Do act professional and respectful.

CHATTER DON'Ts

- Don't Post anything you wouldn't want your HR team or executive staff to read.
- Don't write long Posts.
- Don't use Chatter to replace an in-person conversation.
- Don't Post confidential information.
- Don't Post Personal Messages that are not relevant to your business.
- Don't use foul or unprofessional language.

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 ECSS

Table of Contents

Use this Table of Contents to locate various sections of the ECSS Training Guide that applies to Compliance Survey input.

VA ECSS Help

For support and questions, please contact the E*F*orce Mailbox below. Do not contact the VA Help Desk.

E*F*orce Mailbox	VAVBASTL/RO/EFORCE or email: EFORCE.VBASTL@va.gov

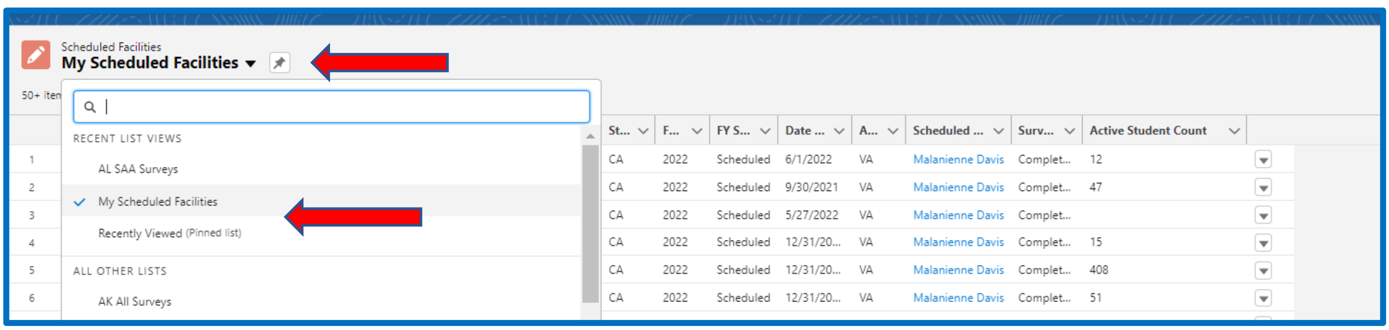
*E*Force-C&L for Surveyors

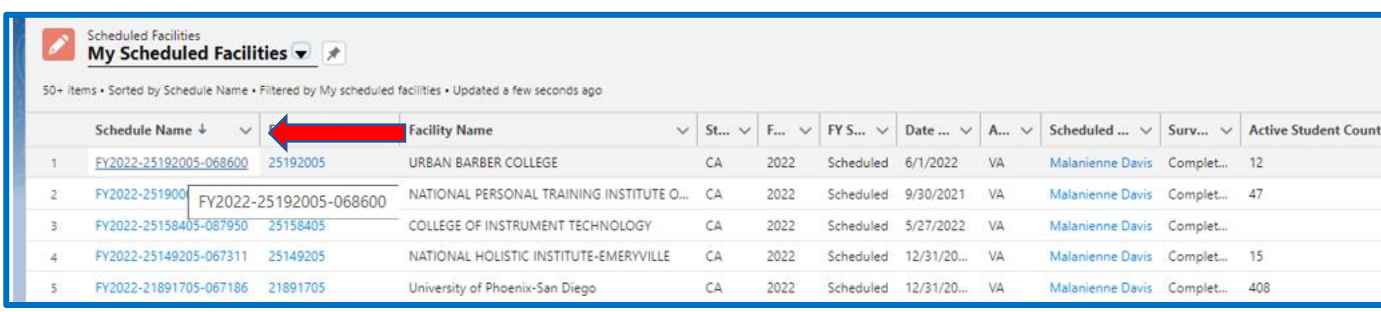
View My Scheduled Facilities

Features of the Schedule Facilities View

The assigned Primary Surveyor will see the following under the **Scheduled Facilities** home page.

All Scheduled Facilities assigned to a Primary Surveyor are listed in the **My Scheduled Facilities** list view. Use the Down arrow to select the My Scheduled Facilities list view. Click on the Schedule Name hyper link to view the assigned **Scheduled** Facilities Overview page. Scheduled Facilities are assigned by Managers.



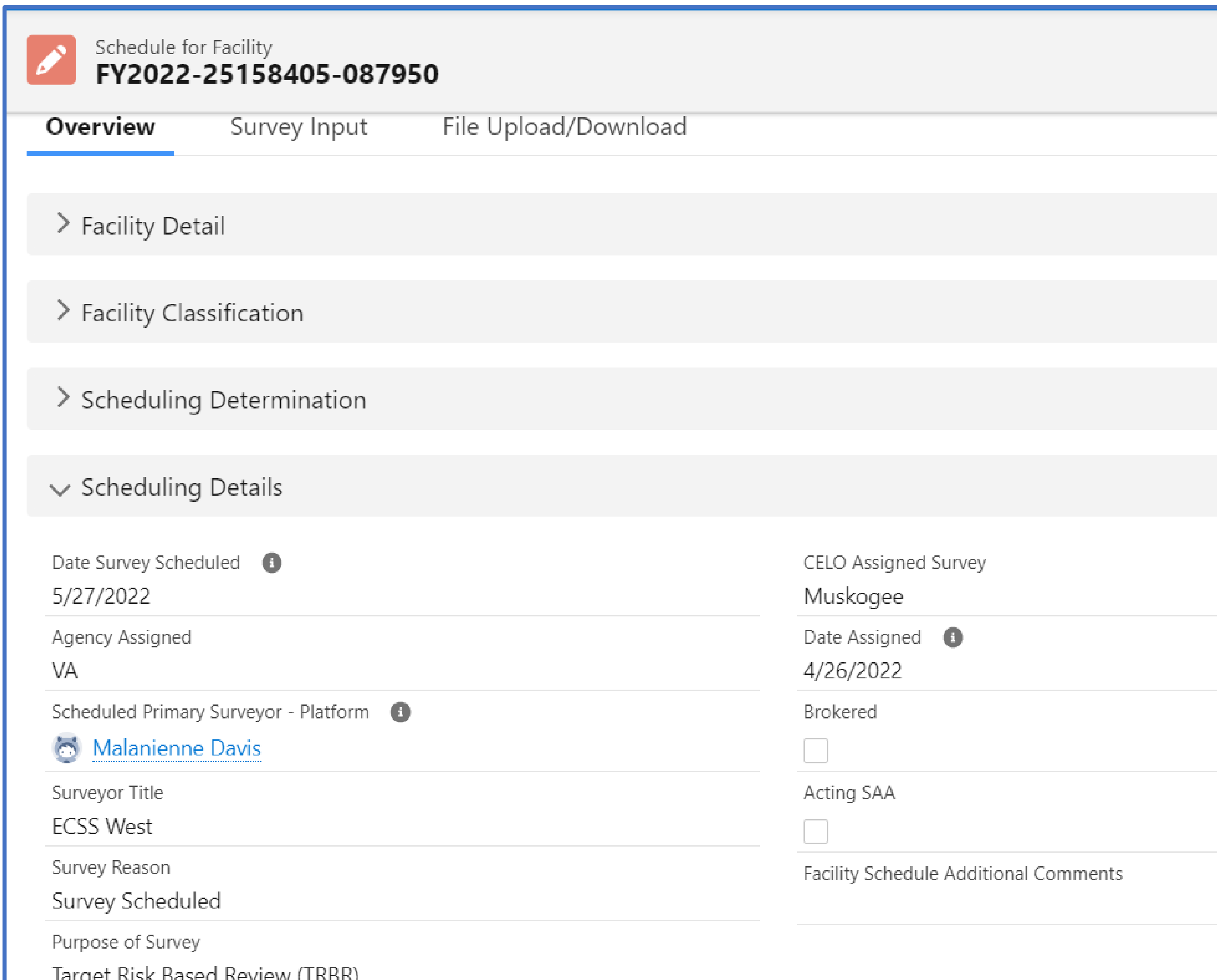


*E*Force-C&L for Surveyors

View My Scheduled Facilities

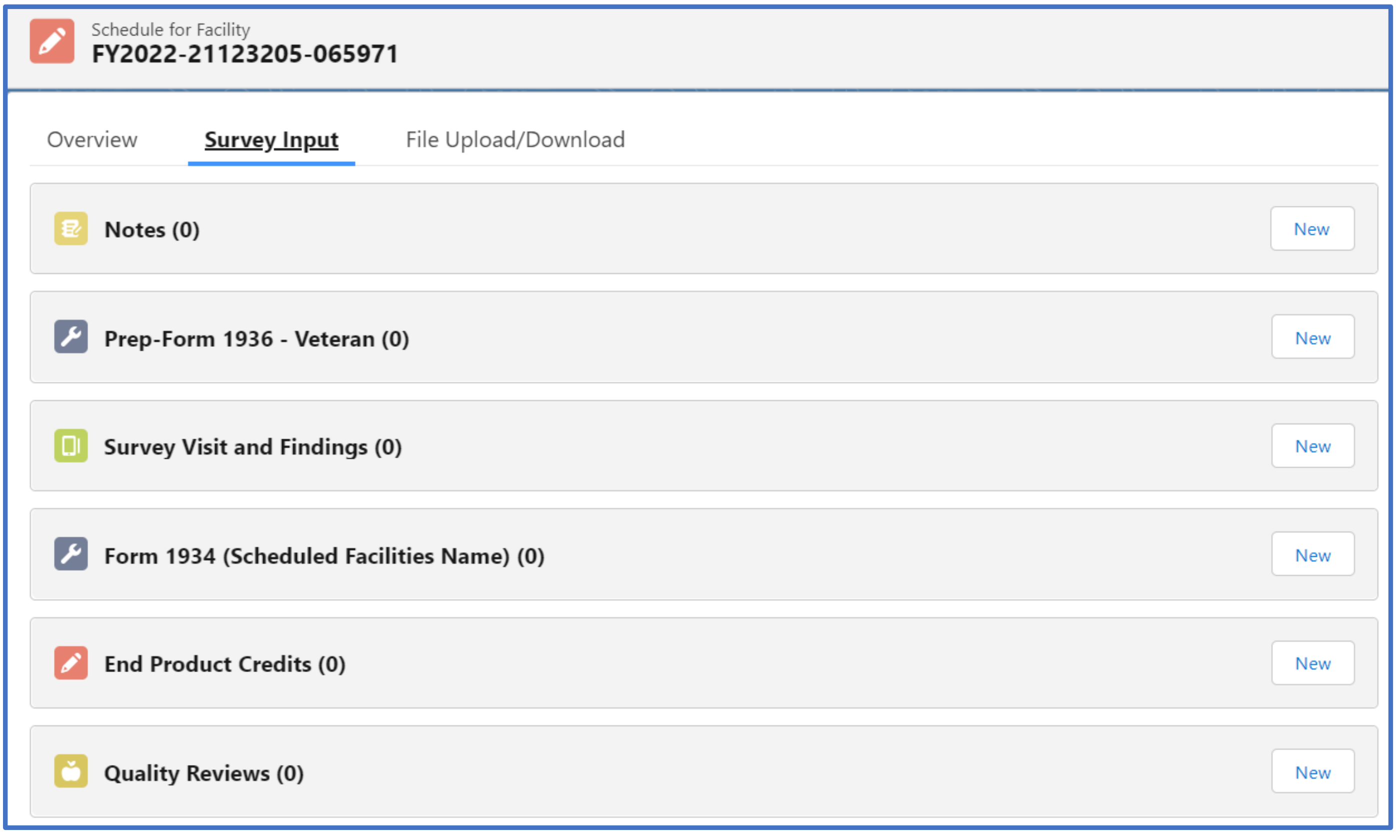
Features of the Schedule Facilities Overview Page

The **Scheduled Facilities** Overview page contains the **Schedule for Facilities Detail** for each facility, including process steps to be taken by the assigned Surveyor, as illustrated on the next page. Use the scroll bar to scroll down the screen to locate all compliance survey steps in *E*Force-C&L. Under the Scheduling Details section, the **Purpose of the Survey** can be reviewed to determine if the survey type is a TRBR, Regularly Scheduled, or RBS survey and the Survey Reason.



Select Survey Input Tab

To access the steps for performing a compliance visit, click on the **Survey Input** tab on the **Assigned Scheduled Facilities** record page. Scroll down to see a complete list of steps.



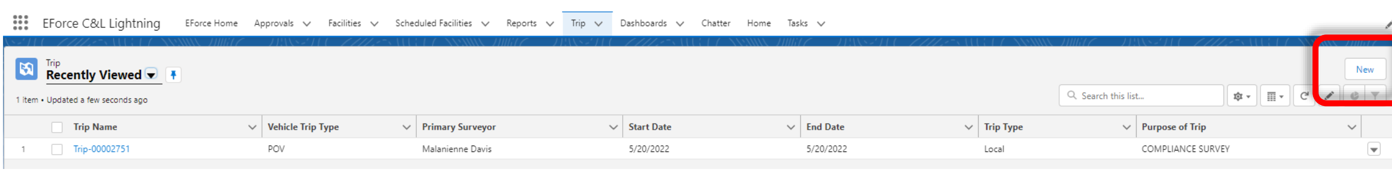
When you are done entering related trip information such as Prep Trip or Form 1936 Veteran, you have two options to return to the Scheduled Facilities record you were working with. 1) Each Record page will have a field called Scheduled Facility and if you click on the link, you will be returned to the Scheduled Facility Record. Or, 2) You can always click on the Scheduled Facilities tab at the top of the page. When the tab loads, the Scheduled Facility record you were working with will display in the Recent Scheduled Facilities List View. Using the Form 1936 is elective; however, if you use other worksheets, you can upload them by clicking File Upload/Download. You will need to fill out sections: Survey Visit and Findings, Form 1934, File Upload/Download, and End Product Credits.

EForce-C&L for Surveyors

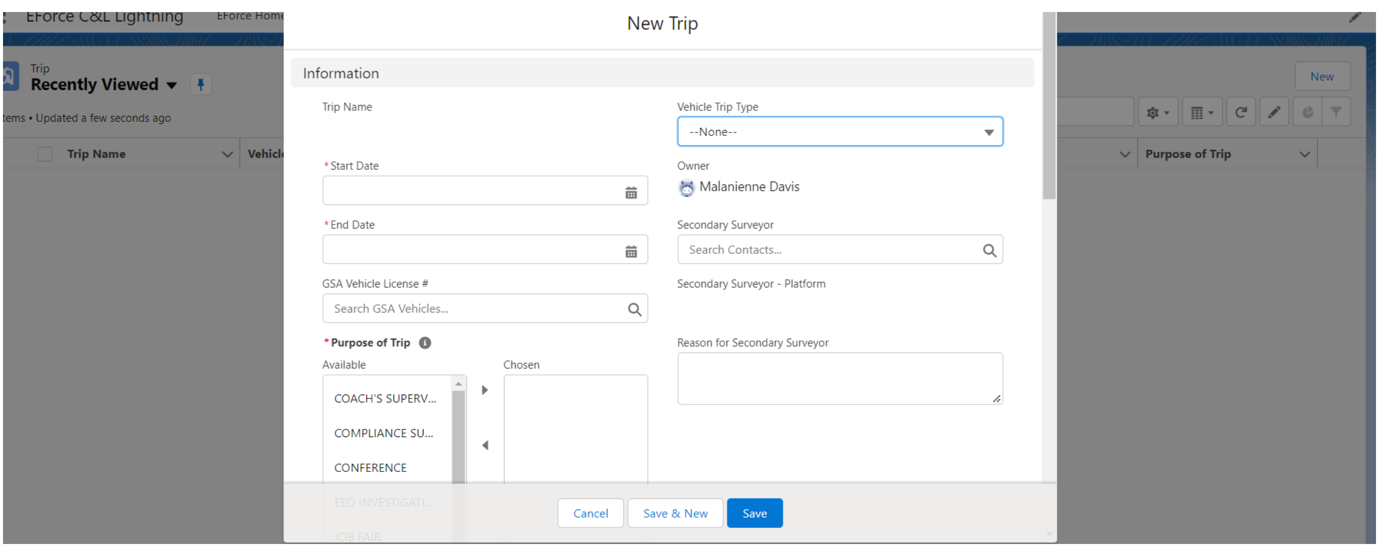
Prepare to Visit a Facility: Prep-Trip

Select New Button to Create a New Prep-Trip Record

From the top of the dashboard, select **Trip** tab. To create a **Prep Trip** record to visit a facility and perform a survey, select Recently Viewed and then select **New.** A pop-up window will generate and ask you to input the data. **Note:** These features will be used at the CELO's discretion. Please refer to your CELO for guidance.



Note: Select New to generate the pop-up window.

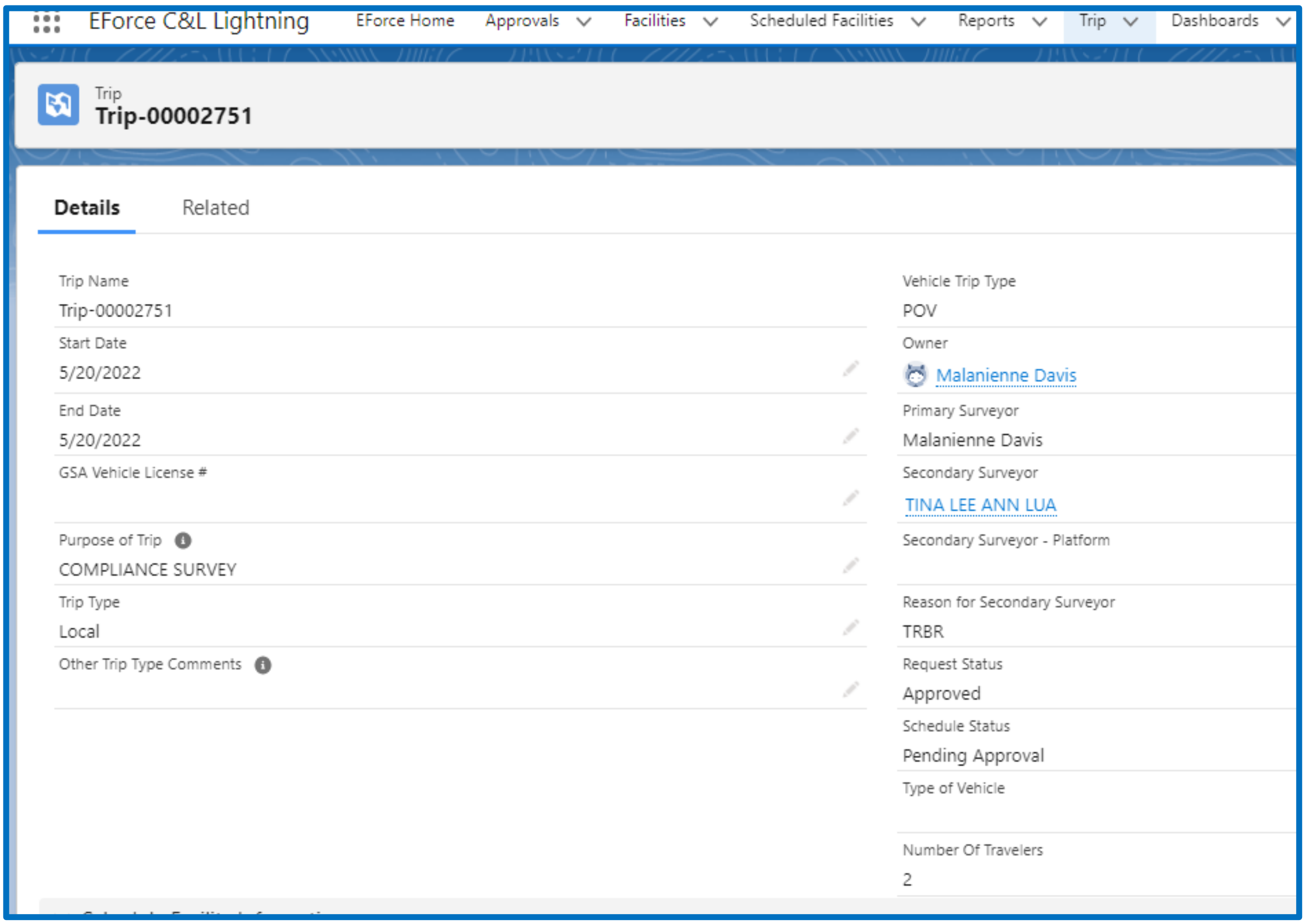


EForce-C&L for Surveyors

Prep-Trip

Enter Information for a New Trip

Enter all appropriate information for a **New Trip.** Select Vehicle Type, GOV or POV. **Note:** This feature will be used at the CELO's discretion. Please refer to your CELO for guidance.

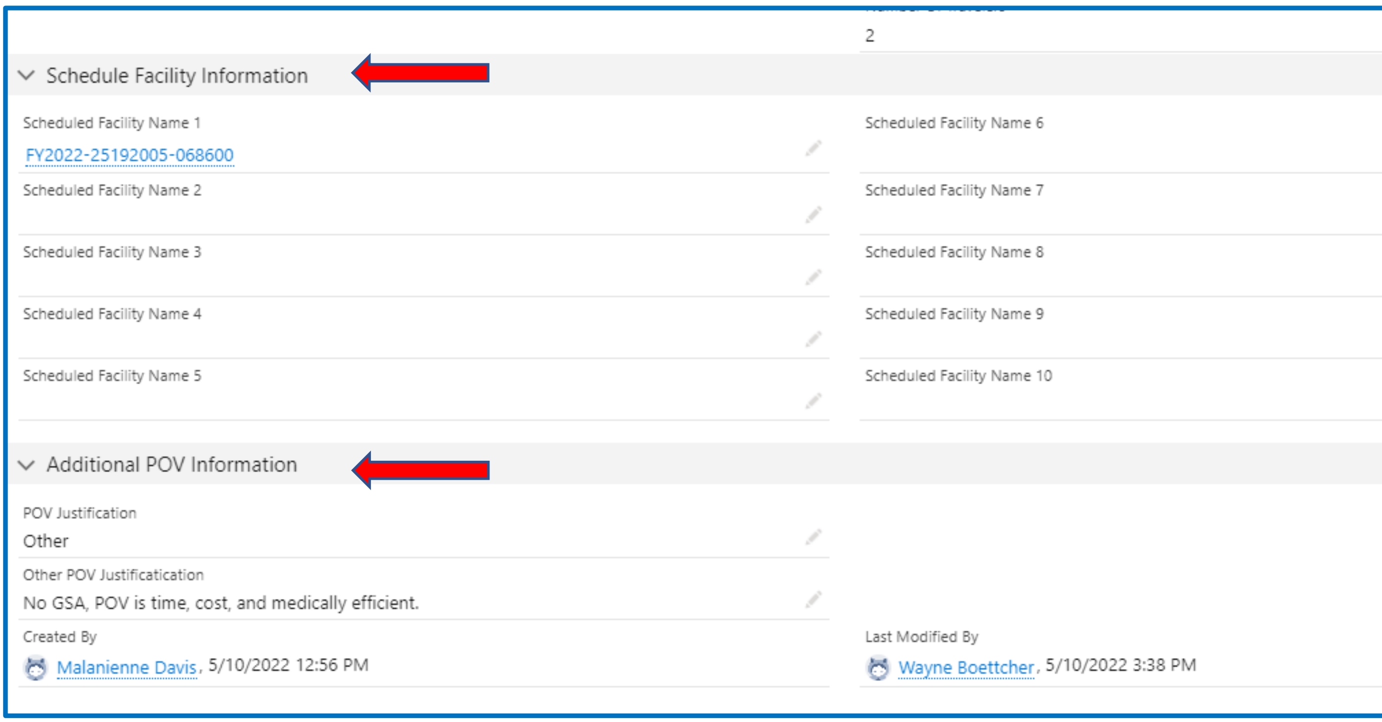


EForce-C&L for Surveyors

Prep-Trip

Enter Scheduled Facilities and Additional POV for a New Trip

Include all scheduled facilities you will be visiting. Select **POV Justification** in the **Schedule Facilities Information** section. **Note:** This feature will be used at the CELO's discretion. Please refer to your CELO for guidance. Enter all **Scheduled Facilities.** Select **POV** from the **Additional POV Information** section below. Click **Save** or **Save & New** to save **Trip-Prep** data.

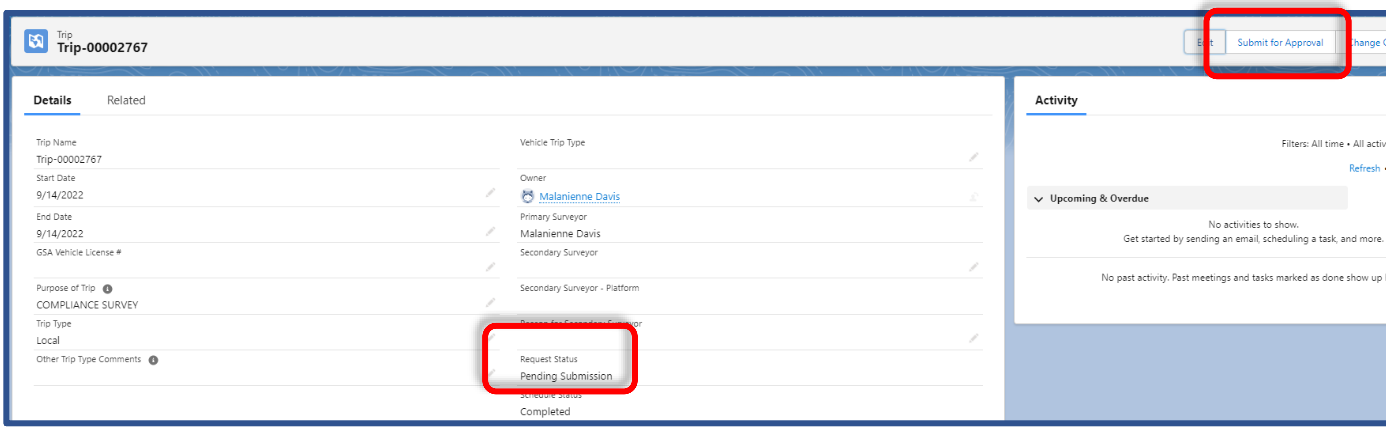


EForce-C&L for Surveyors

Prep-Trip

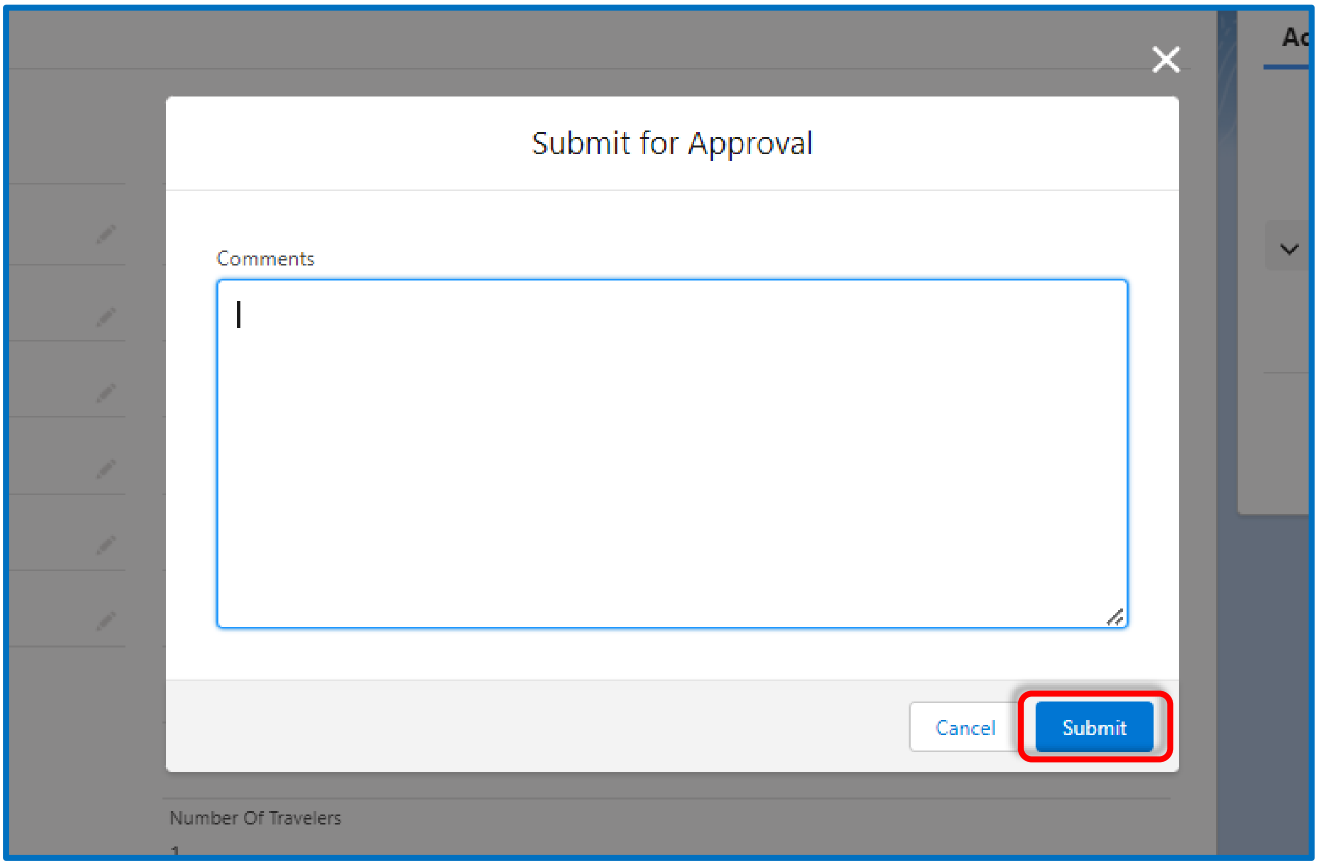
Submit for Approval on the Trip Page

Review **Trip Detail**, submit **Saved Trip** for approval. Notice that the **Request Status** is **Pending Submission.** Navigate to the right hand side and click the "Submit for Approval" button. Notice Request Status is 'Pending Submission‘ prior to submitting the request.



Submit for Trip Approval Pop-up Window

The following pop-up window will appear confirming that you wish to submit your trip for approval. Enter any additional comments in the **Comments** field. Click the **Submit** button to complete trip submission.

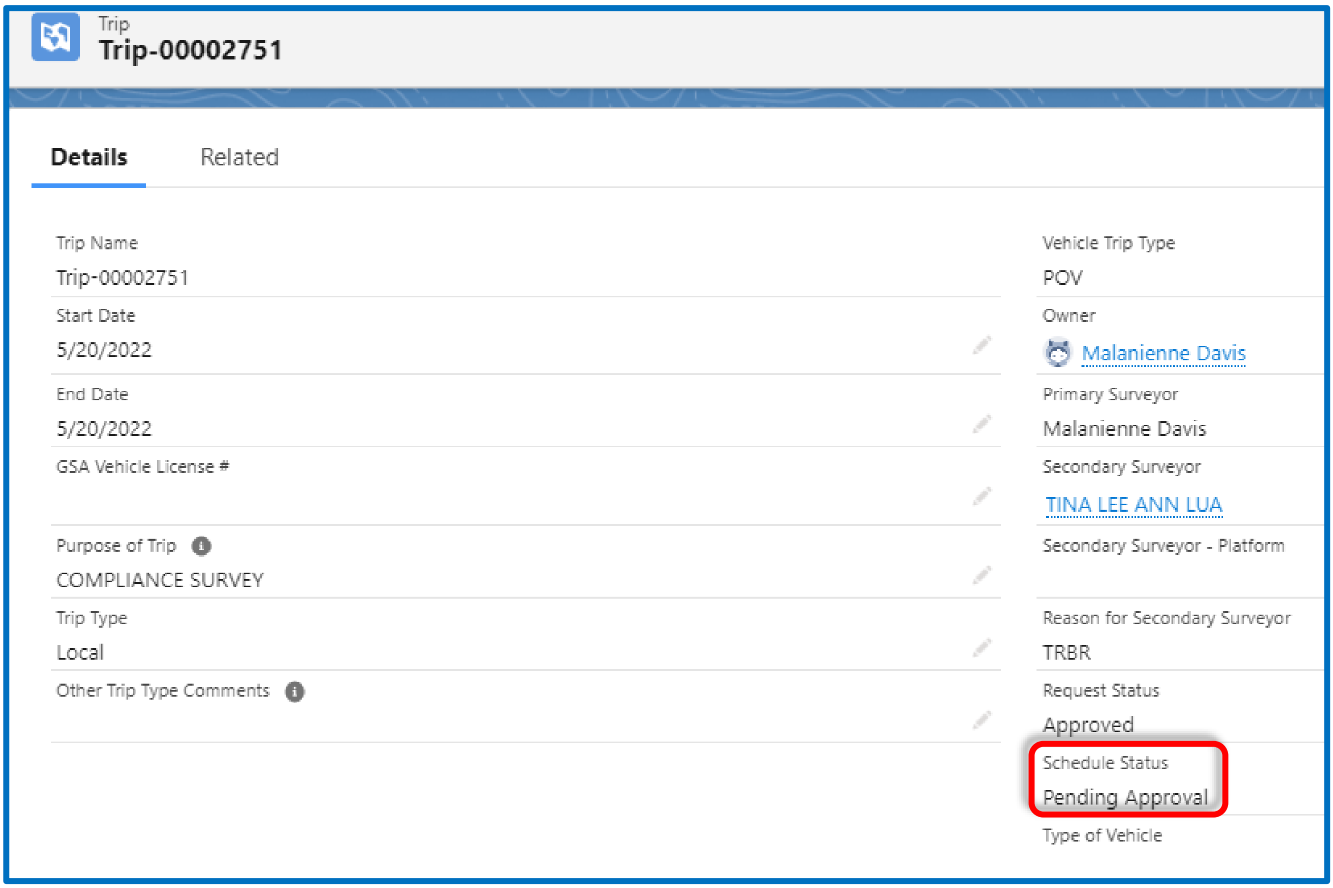


EForce-C&L for Surveyors

Prep-Trip

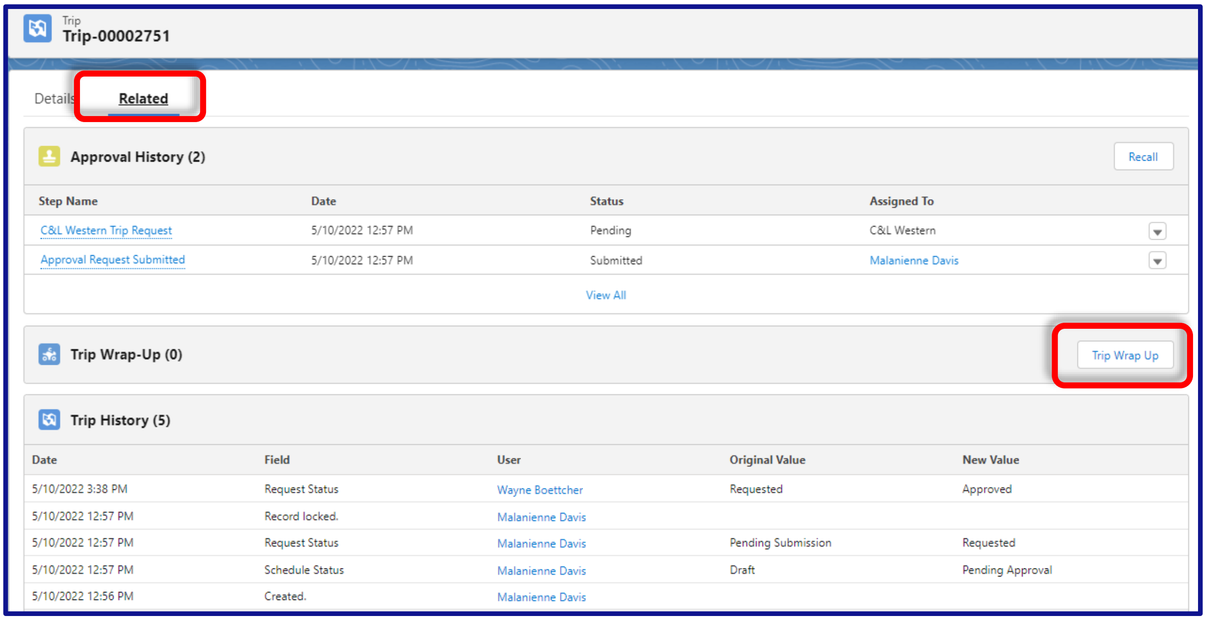
View Schedule Status and Approval History

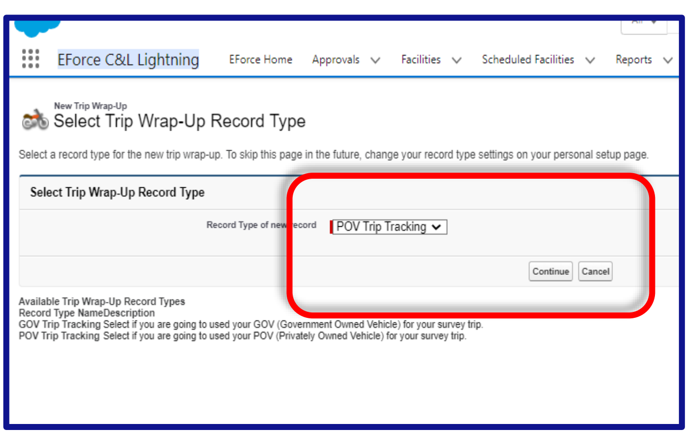
The Trip record has two tabs: Details and Related. The **Submitted** trip shows the **Request Status** as **Pending Approval**. To view approval history, click the **Related** link on the Trip record.

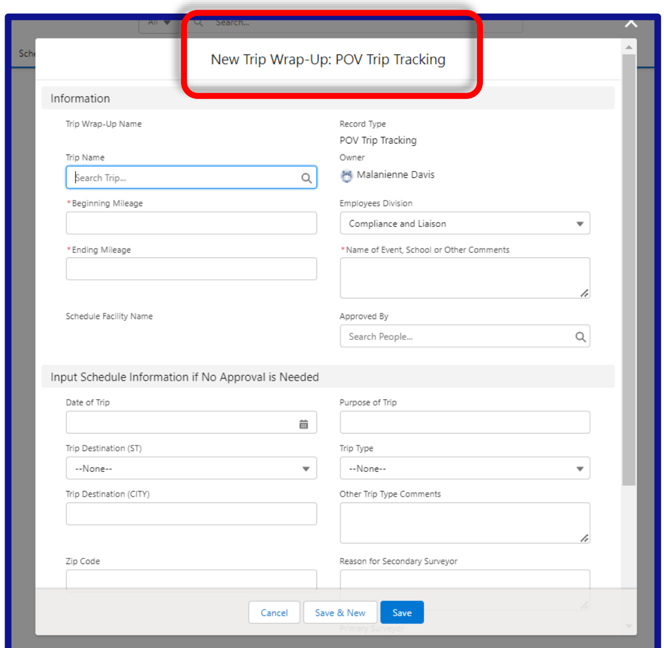


View Schedule Status, Approval History, and Trip Wrap-Up

Under the Trip record Related tab, there is the **Approval History, Travel History,** and **Travel Wrap-up**. To view approval history, click the **Related** link on the Trip record. When selecting trip Wrap-up, select GOV or POV and continue, which will generate a pop-up window to close out your trip.





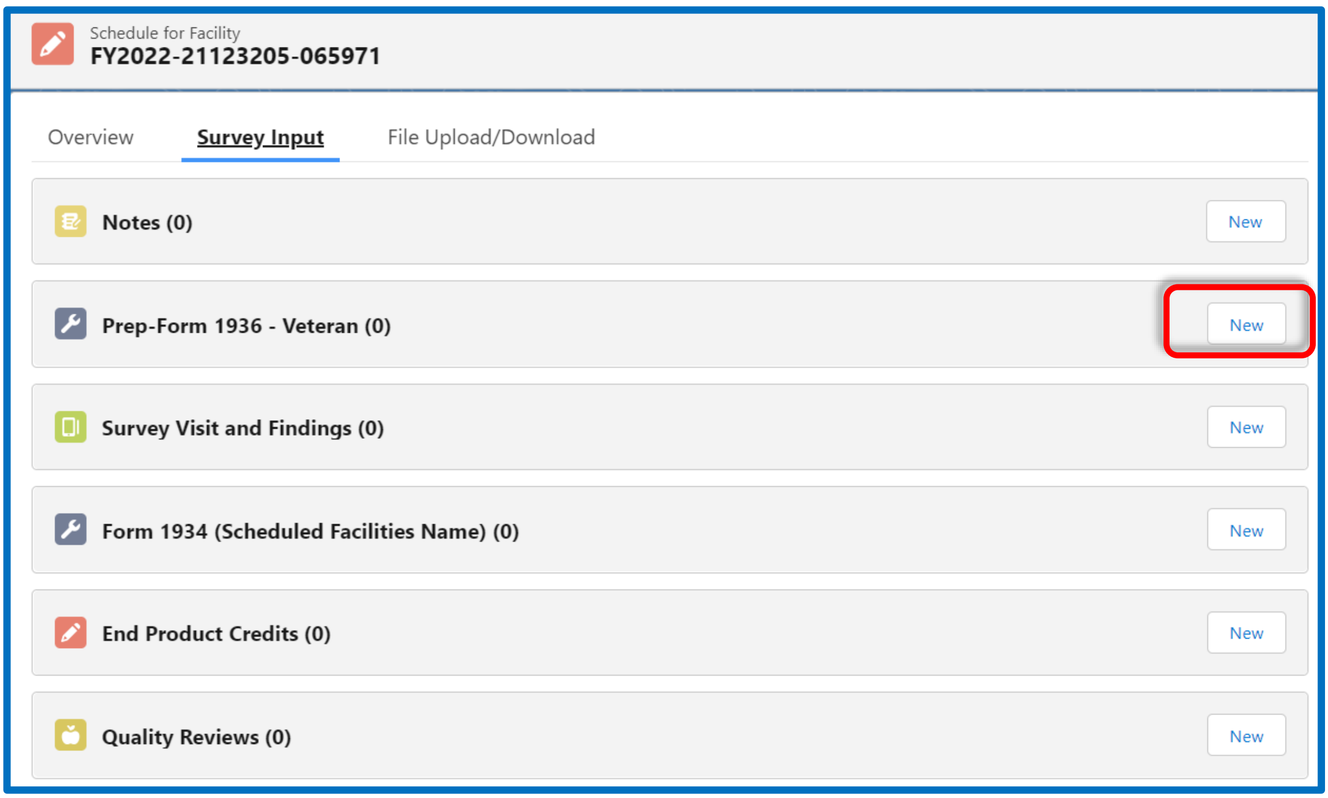


EForce-C&L for Surveyors

Enter Form 1936

Create a New Prep-Form 1936

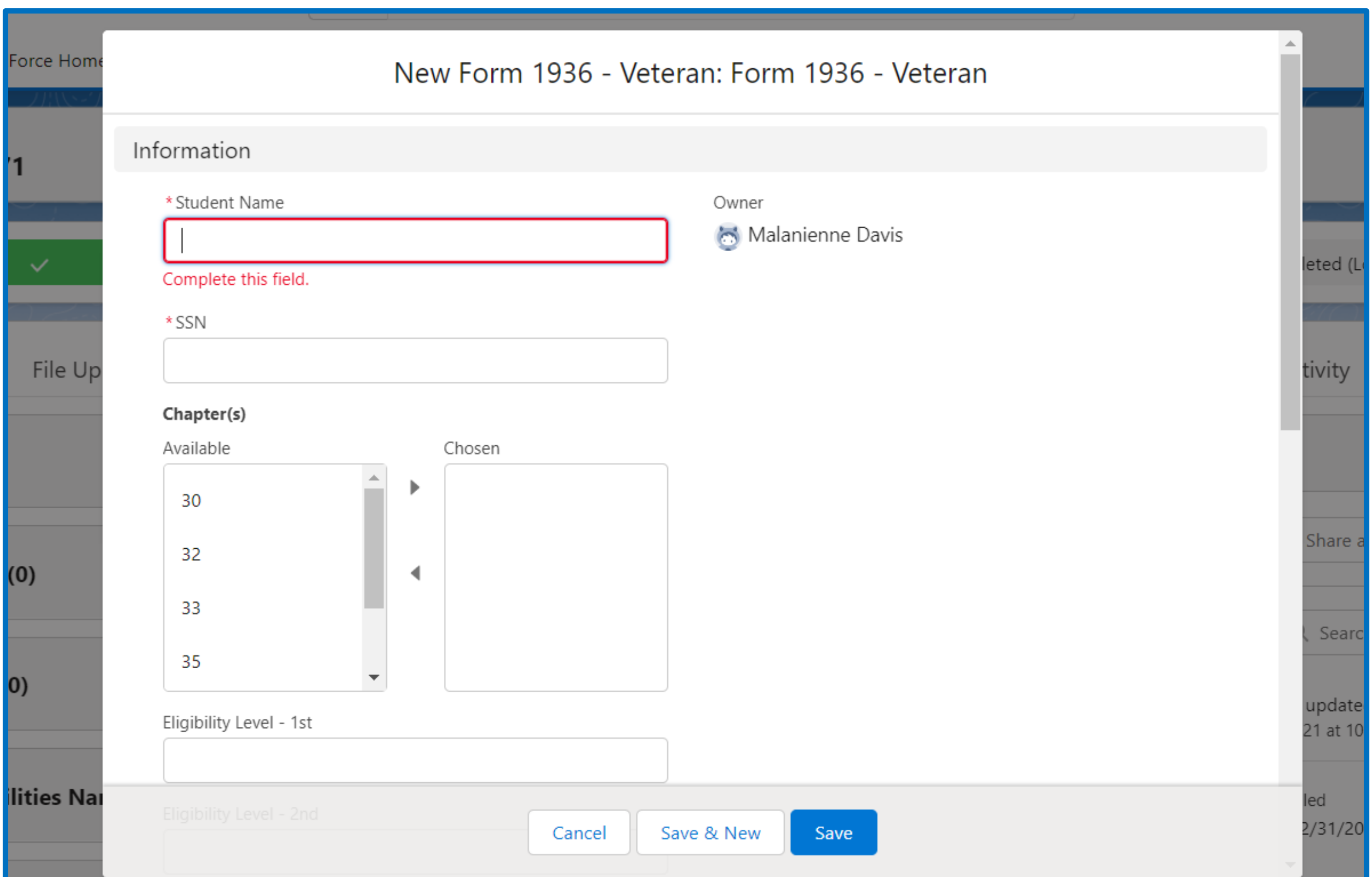
From the Survey Input tab, continue the preparation steps by selecting the **New** button to the right of **Prep-Form 1936.**



Complete New Form 1936

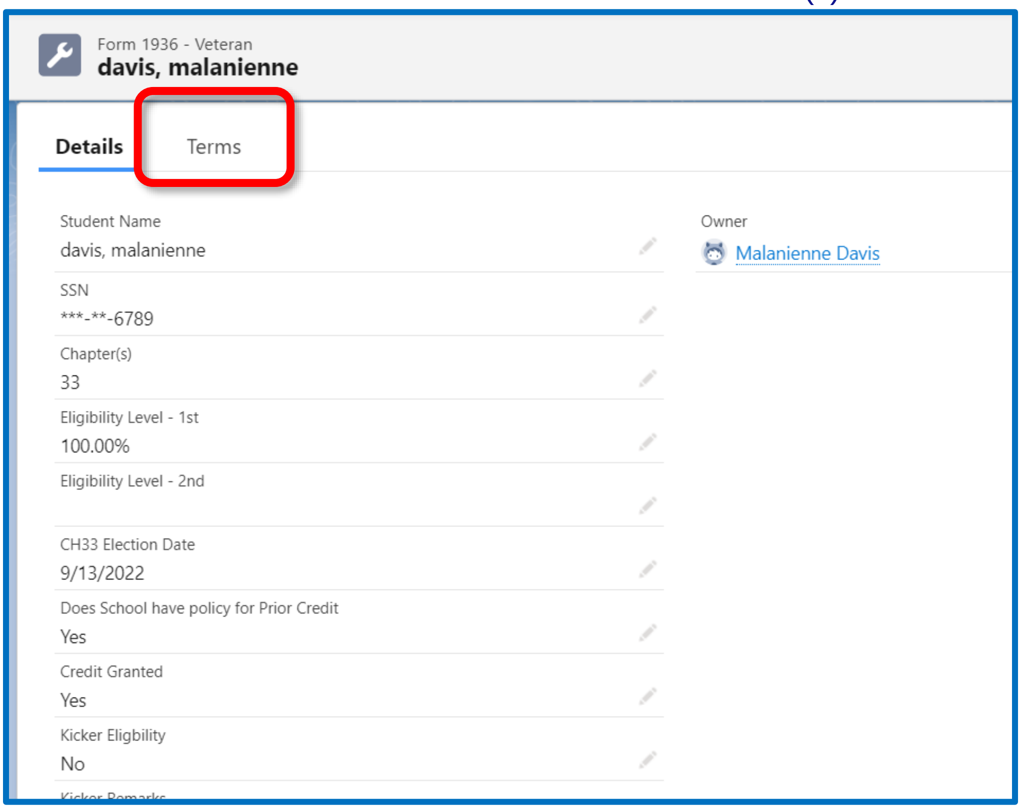
Complete the **New Form 1936** details. Use this form, or, alternatively, upload a scanned or electronic version of Form 1936 using the **Upload Files** feature illustrated on page 65, and follow the file naming convention described on page 66. A student records is created upon completing the Form 1936. After the student's record is created, you can create subsequent records for each term (page 34).

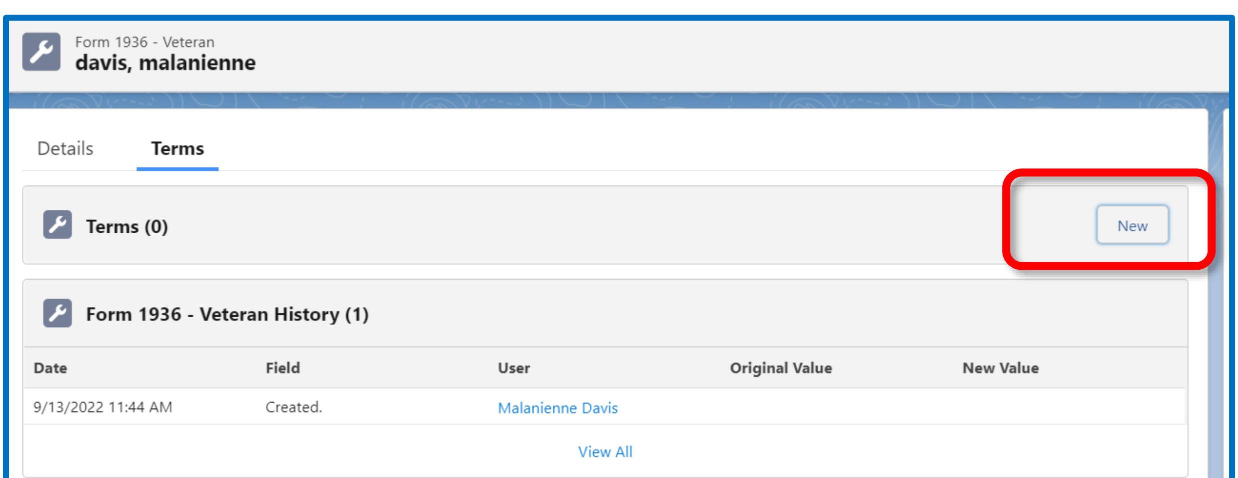
Using **New Form 1936-Veteran** enter the information for each veteran record reviewed, including the **Chapter 33** section, if applicable. Click "Save & New" when you finish each record, and then "Save" on the final record to be taken back to the main survey page. Select all chapters that apply.



New Form 1936, continued

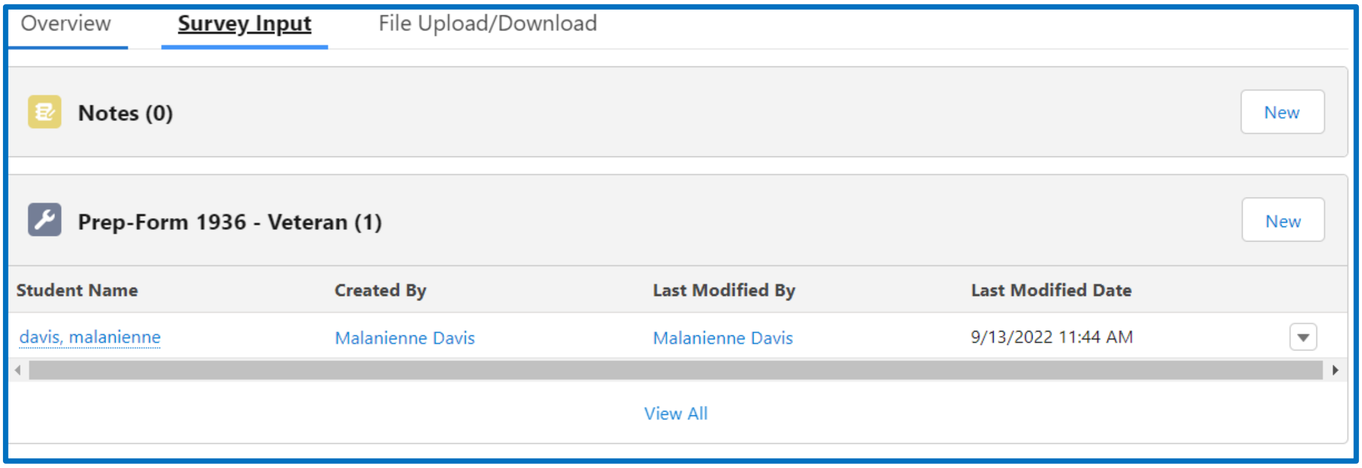
Continue completing the information on the **New Form 1936** details page. When you are done, click Save or Save & New to continue. Select New to enter the Term(s) information.

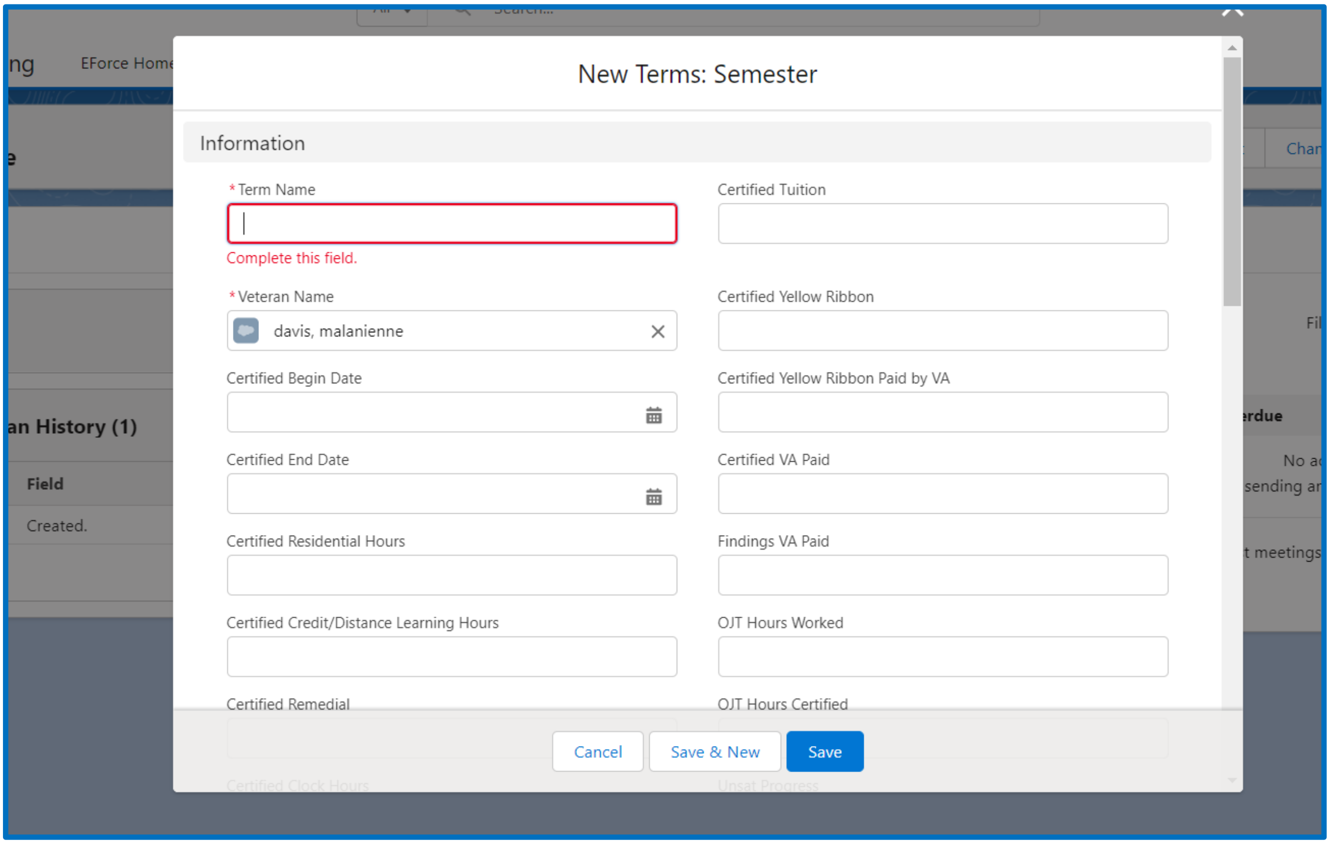




Enter New Term for a Student

Enter terms for a student on the **Form 1936 Terms** related list. Use this form, or alternatively, upload a scanned or electronic version of Form 1936 using the **Upload Files** feature illustrated on page 65, and follow the file naming convention described on page 66.



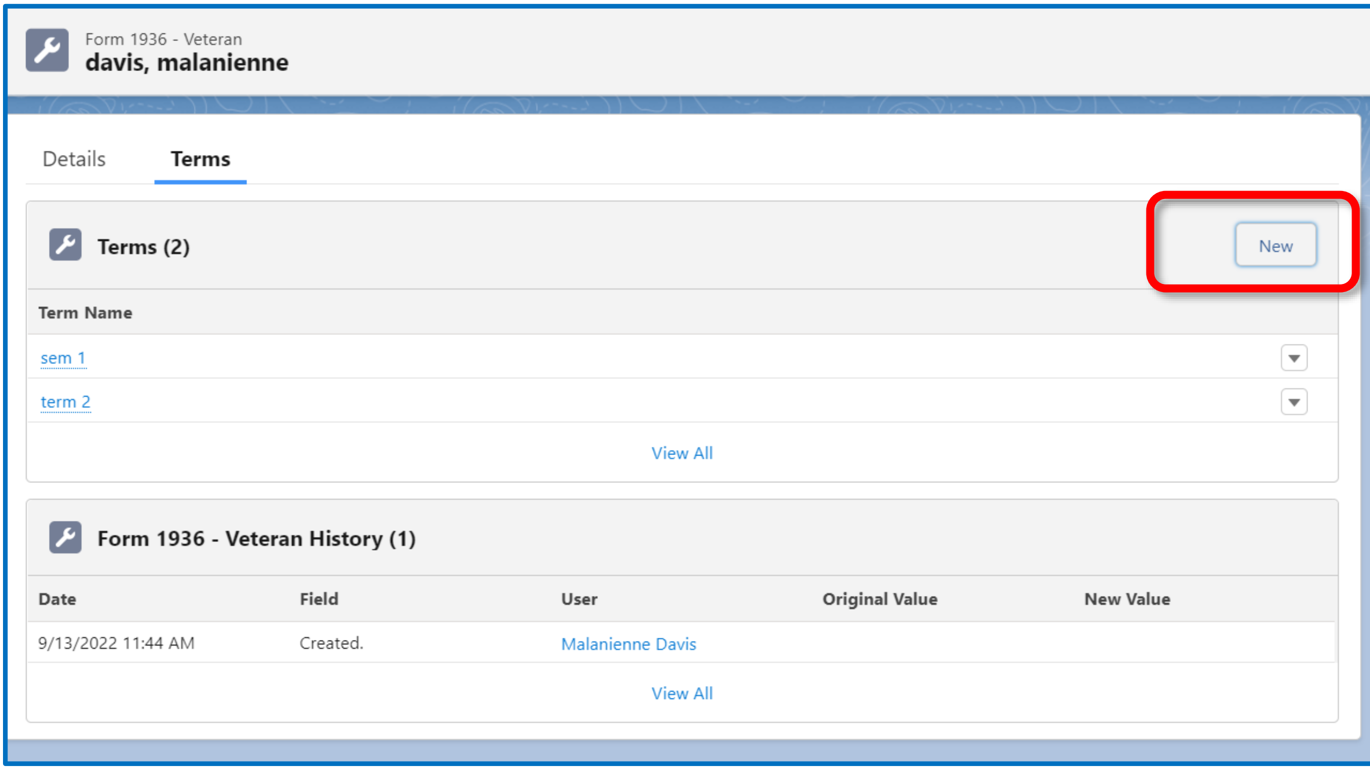


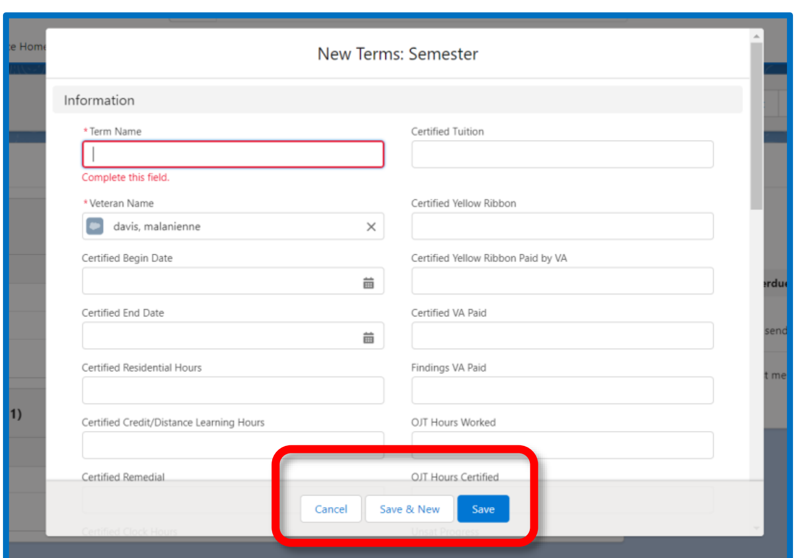
EForce-C&L for Surveyors

1936 Additional Terms

Enter Additional Term Information

Enter another term data for a student, on the 1936 student record page, select **New.** Once completed, click **Save** or **Save & New.**

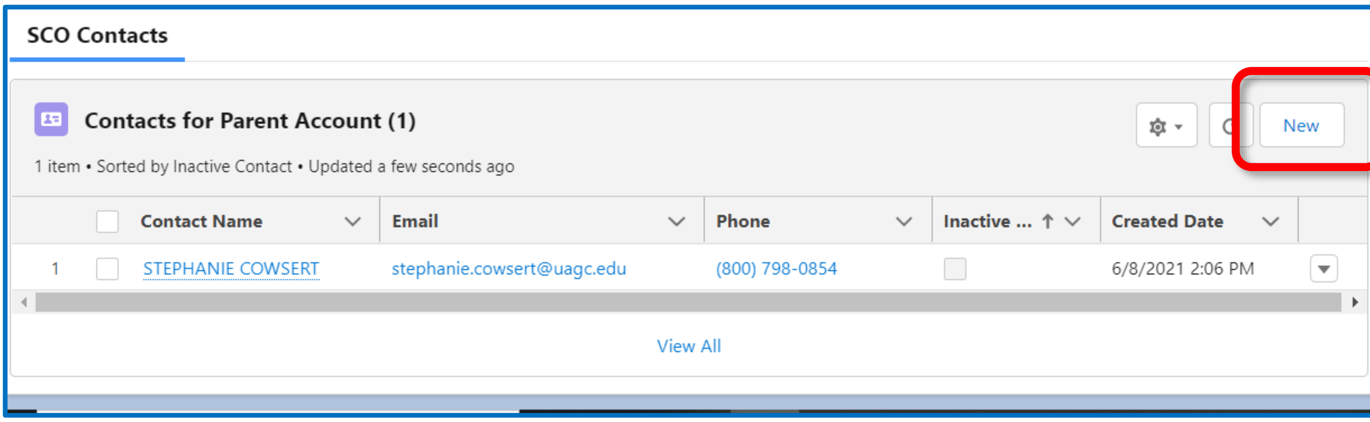




Creating a New SCO

Create New SCO Information

From the **Scheduled Facilities** detail page, continue the preparation steps: **Prep-SCO Information.** You can also update current existing SCO information or check the box if the SCO is inactive.



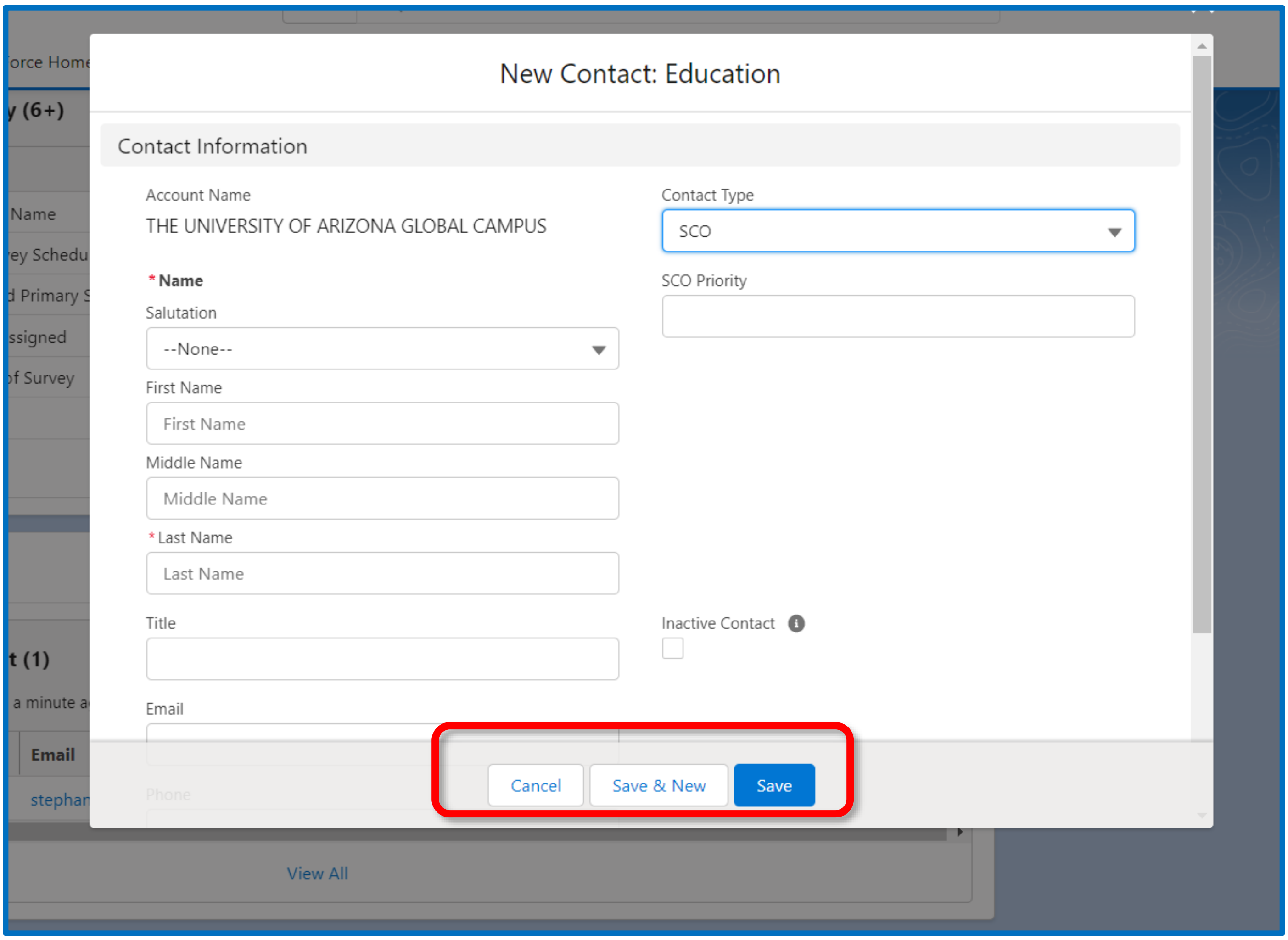
Click on the **New** button to launch the New Prep SCO information page.

EForce-C&L for Surveyors

Entering New SCO Information

Launch New SCO Information

SCO Information Edit page is used to select a SCO at the Scheduled Facility. All EForce- C&L email correspondence will be sent to the SCO selected here. Be sure to have searched before entering new SCO records.

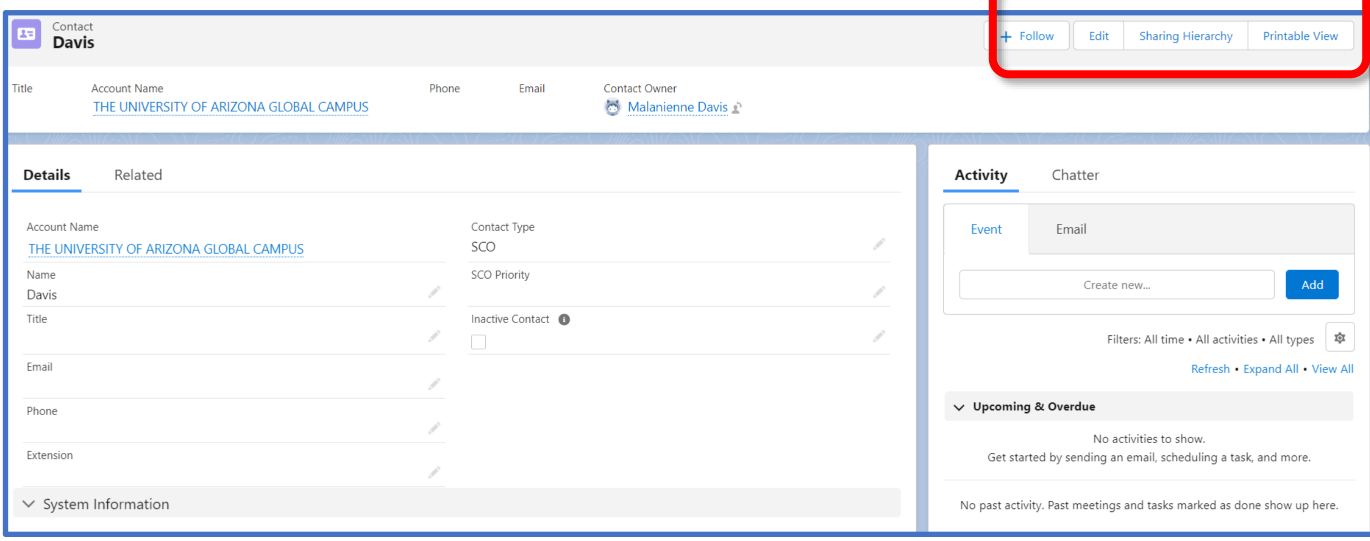


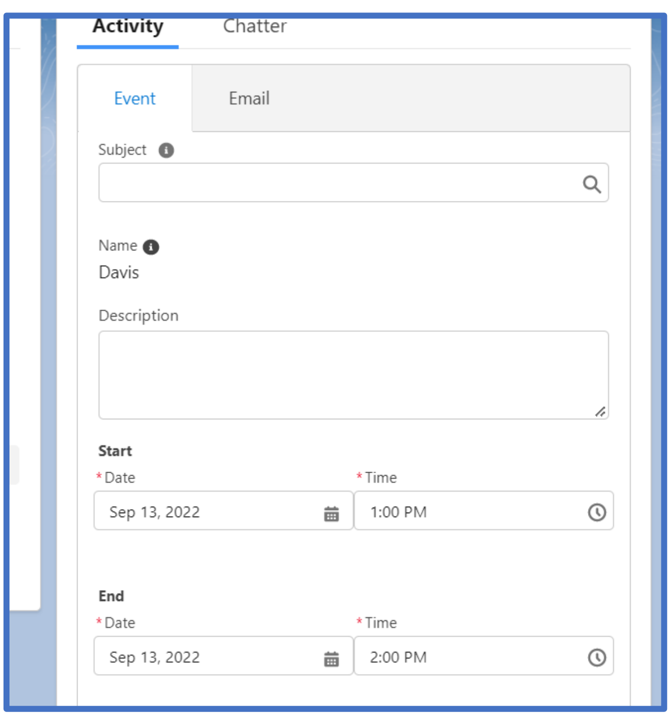
EForce-C&L for Surveyors

Adding New Tasks-SCO Information

Add New Tasks

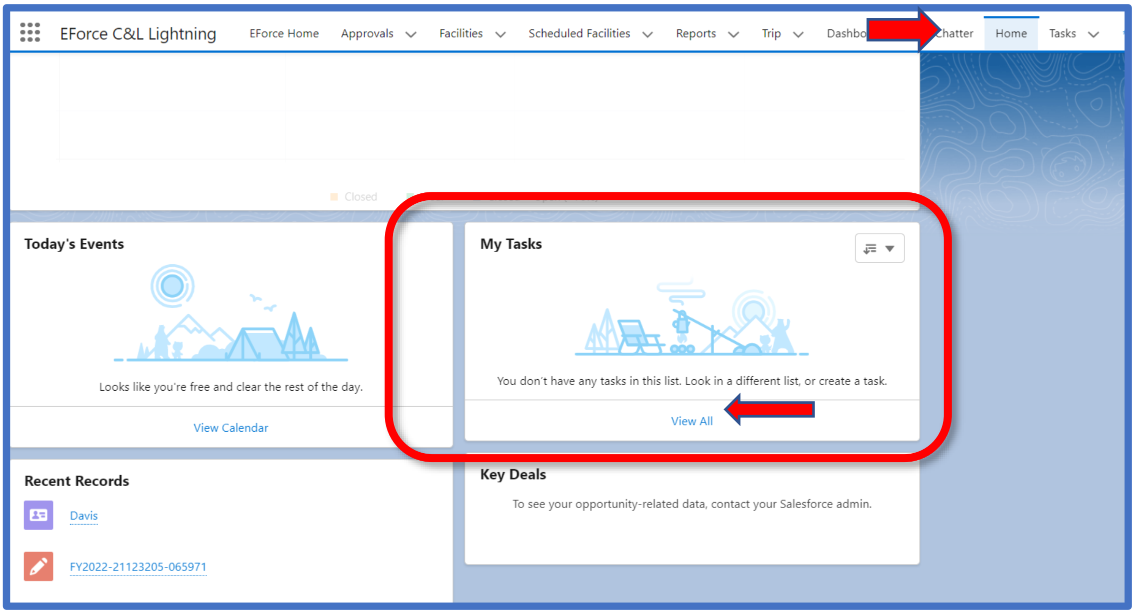
Once the SCO is selected and saved, users can edit SCO items from the list under the newly added **SCO Information** section on the **Scheduled Facilities** detail page. Click on the **SCO name** hyperlink name to add tasks, set reminders, log calls, send emails, add event information and attach files.

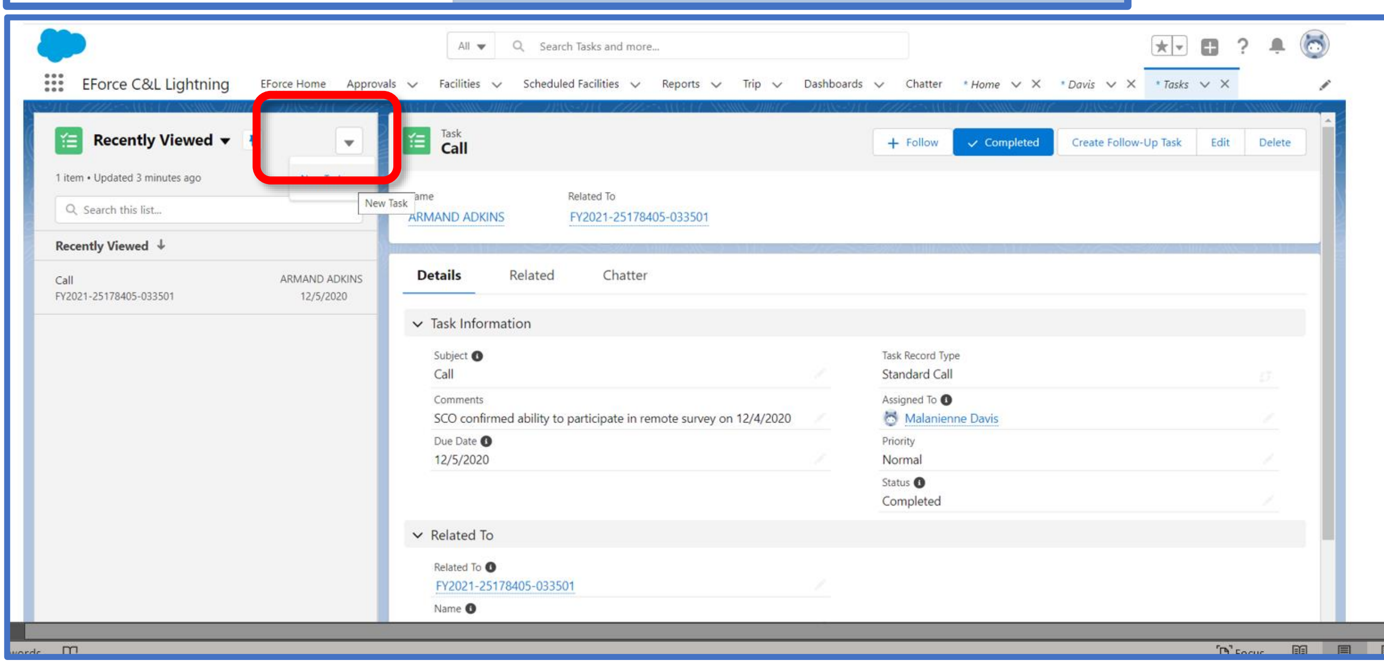




Create a New Task Related to a SCO

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 then click the New button in the upper left. From the Home Page, click on View All in the Today's Tasks panel.



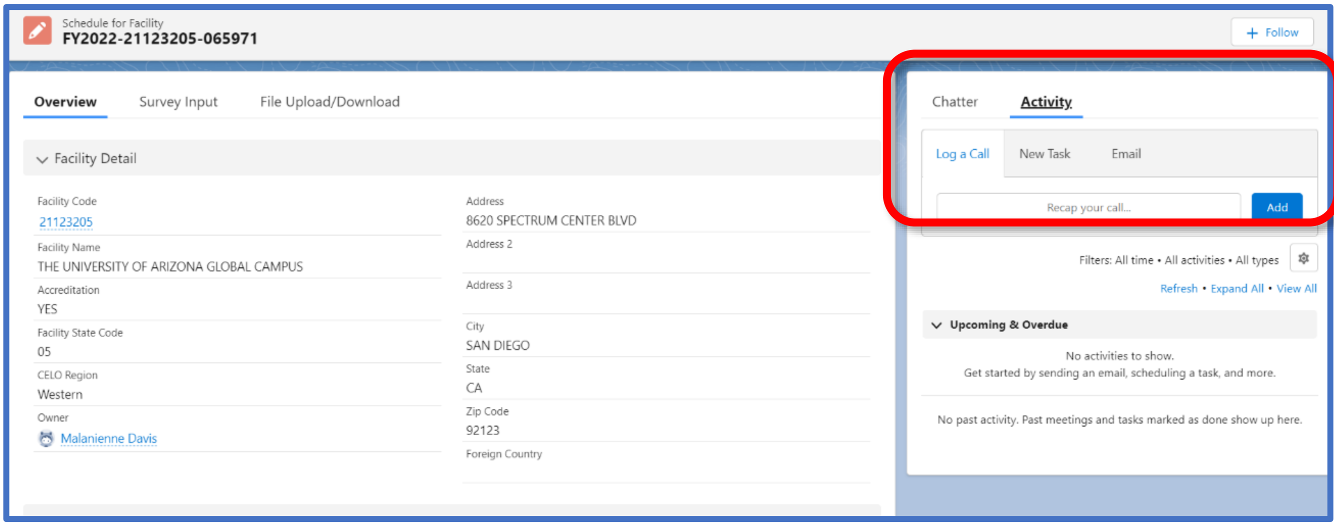


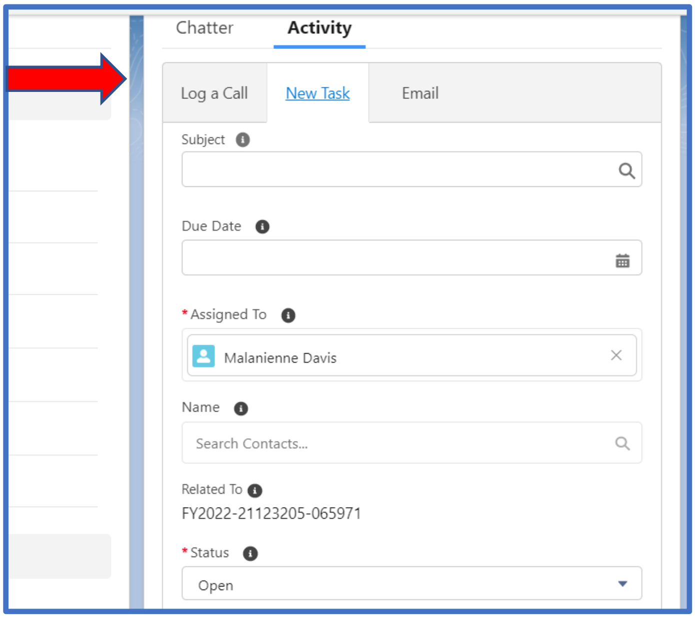
EForce-C&L for Surveyors

Activity History: Log a Call or Send Email

Log a Call or Send an Email from the Activity History

From the **Scheduled Facilities** detail page, continue the preparation step; here you can **Log a Call, Create a New Task, or Send an Email**.



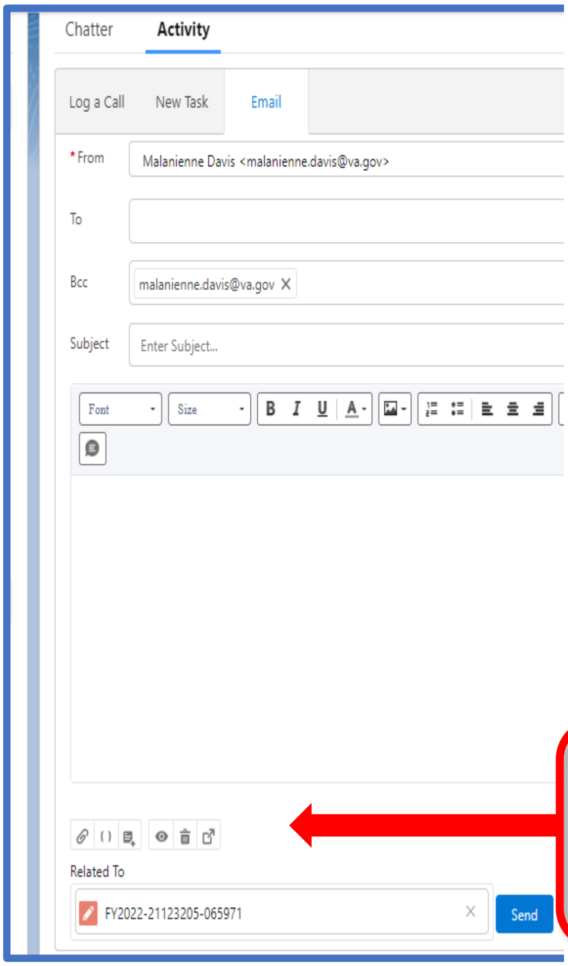


EForce-C&L for Surveyors

Send an Email

Send an Email Using a Template

Enter all pertinent email information as needed. Click on the Template Icon at the bottom of the page and select the insert template icon to search for and select a template. More templates will be added over time. Click on the paperclip icon at the bottom of the page to attach files as needed. Your sent emails will display in **Activity History**. Do not change the information in the Related to field.



Click the paperclip icon to attach relevant files. Click on the template icon (document with a plus sign) to insert a template.

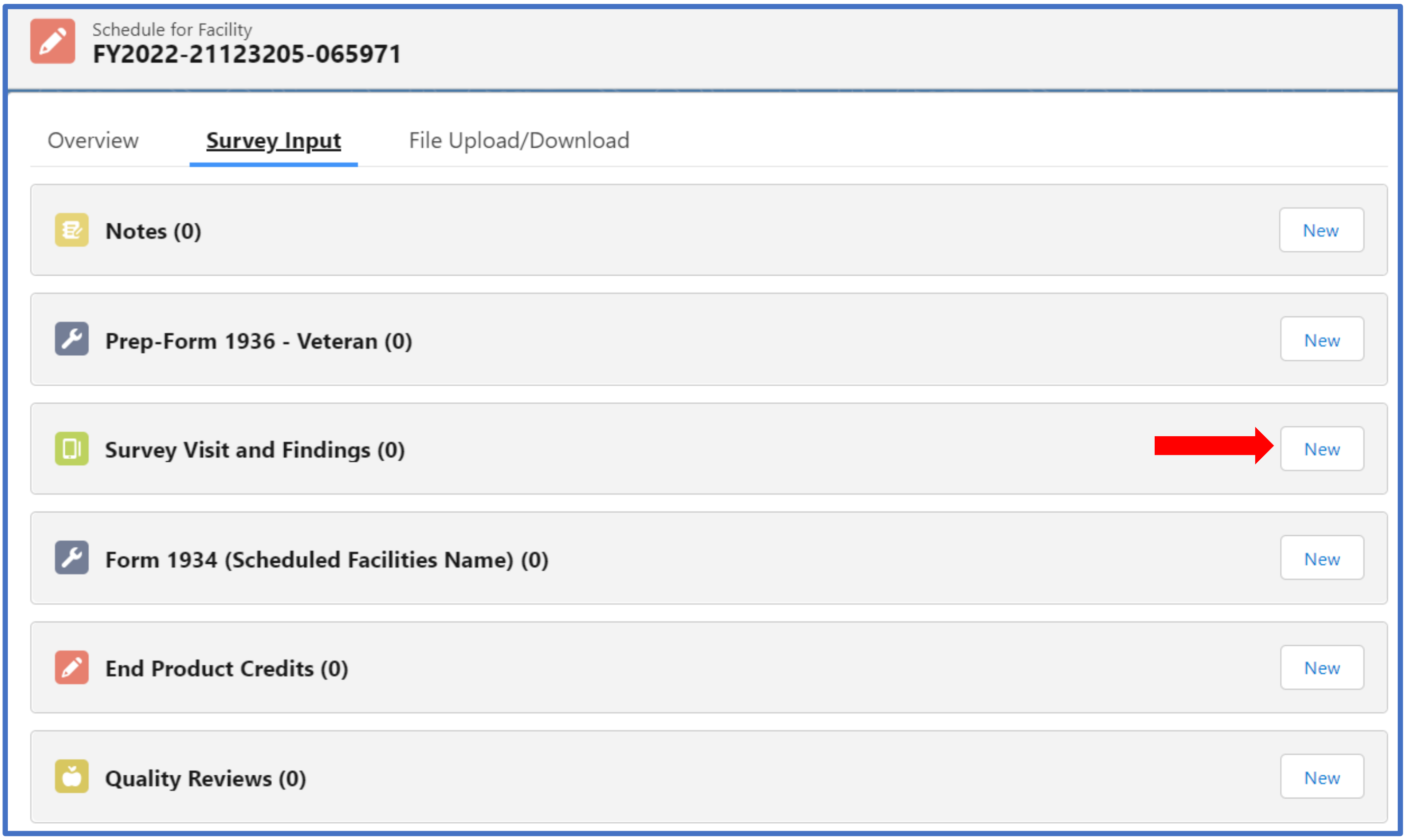
EForce-C&L for Surveyors

Survey Process Step 1:

Enter New Survey Visit and Findings Data

Access the Survey Visit and Findings Section

From the **Scheduled Facilities** record, click on the **Survey Input** Tab to access **Survey Visit and Findings**.



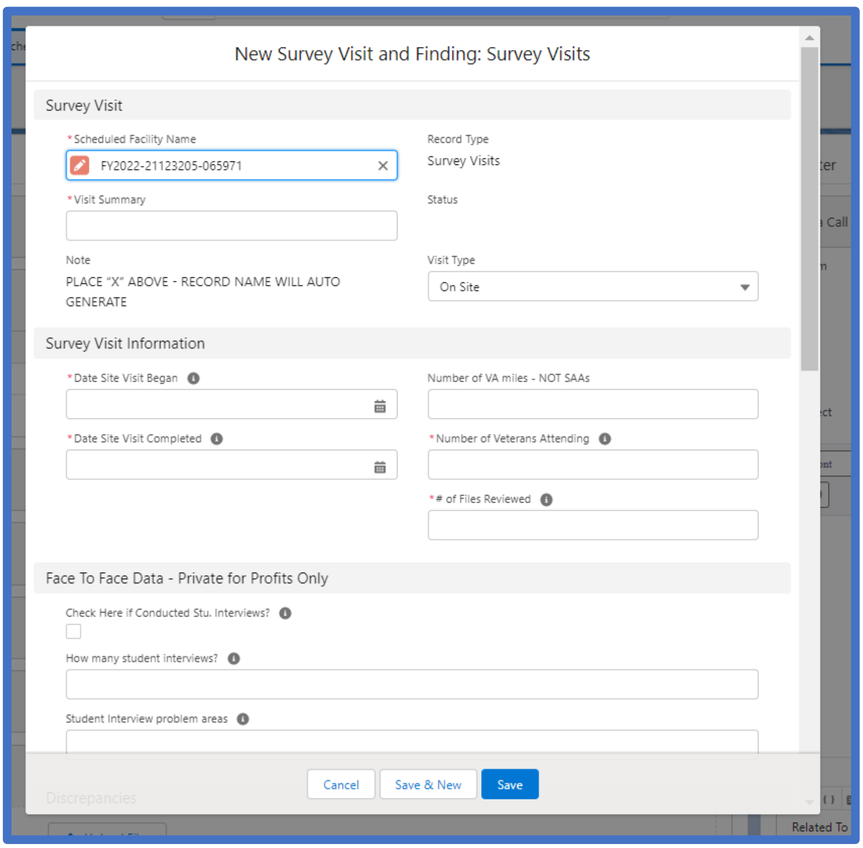
EForce-C&L for Surveyors

Survey Process Step 1:

Enter New Survey Visit and Findings Data

Enter a New Survey Visit and Findings Details

Enter **Survey Visit and Findings** details in the **New Survey Visit and Findings** page**.** It is recommended to immediately log your visit by completing, at minimum, the **Survey Visit** and **Survey Visit Information** sections, which will change the status of your survey visit to ‘Visited’. The other survey visit status types, ‘Findings Collected’, ‘Expanded (see page 45)’, ‘Under Liability Review’, are discussed on page 58. **Note: Visit Type** defaults to ‘On Site’, if remote select ‘Remote’. Place an “X” under the Scheduled Facility Name, add Visit Type, Site Visit Information, Veteran population, Files reviewed, and Face-to-Face information. There are multiple <u>required</u> fields to save the record which includes the "Date Site Visit Began," "Date Site Visit Completed," "Number of Veterans Attending," "# of Files Requested," and "Discrepancies (see page 46)."



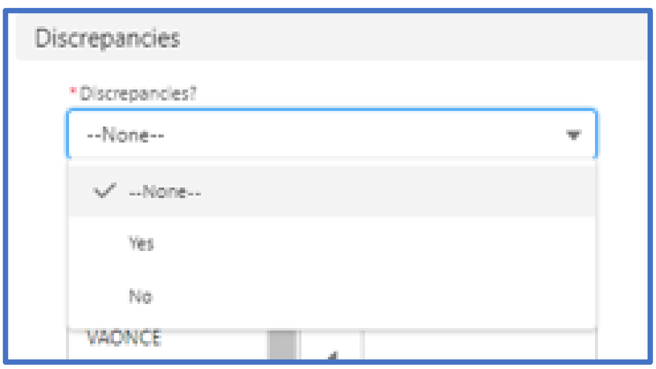
EForce-C&L for Surveyors

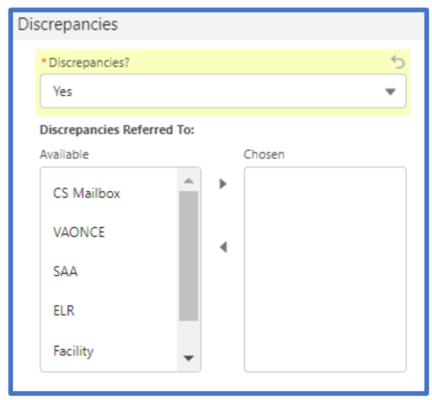
Survey Process Step 1:

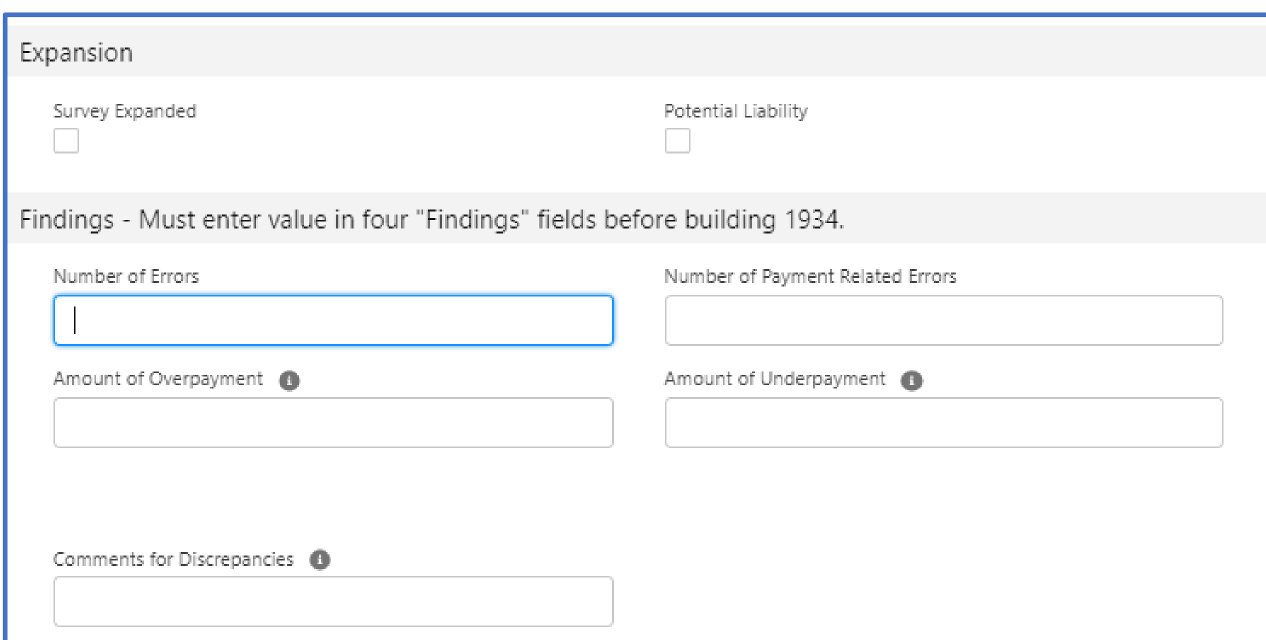
Enter New Survey Visit and Findings Data

Enter Survey Findings with no Discrepancies

For Survey Findings in which there are no **Discrepancies**, the **Findings** fields will automatically be filled in with zeros, as illustrated below. The findings fields MUST have a value of zero, or greater than zero, to proceed. If the answer is Yes, the user can suspend the record for completion after the discrepancies are processed and upon completion, the user must fill out all four required fields in the "Findings" section: "Number of Errors," "Number of Payment Related Errors," Amount of Overpayment," and "Amount of Underpayment." If there isn't an overpayment but and underpayment, the user must still enter a value number of "$0" and vice versa. If no, the user can move on to complete the record without filling in these required fields.







EForce-C&L for Surveyors

Survey Process Step 1:

Enter New Survey Visit and Findings Data

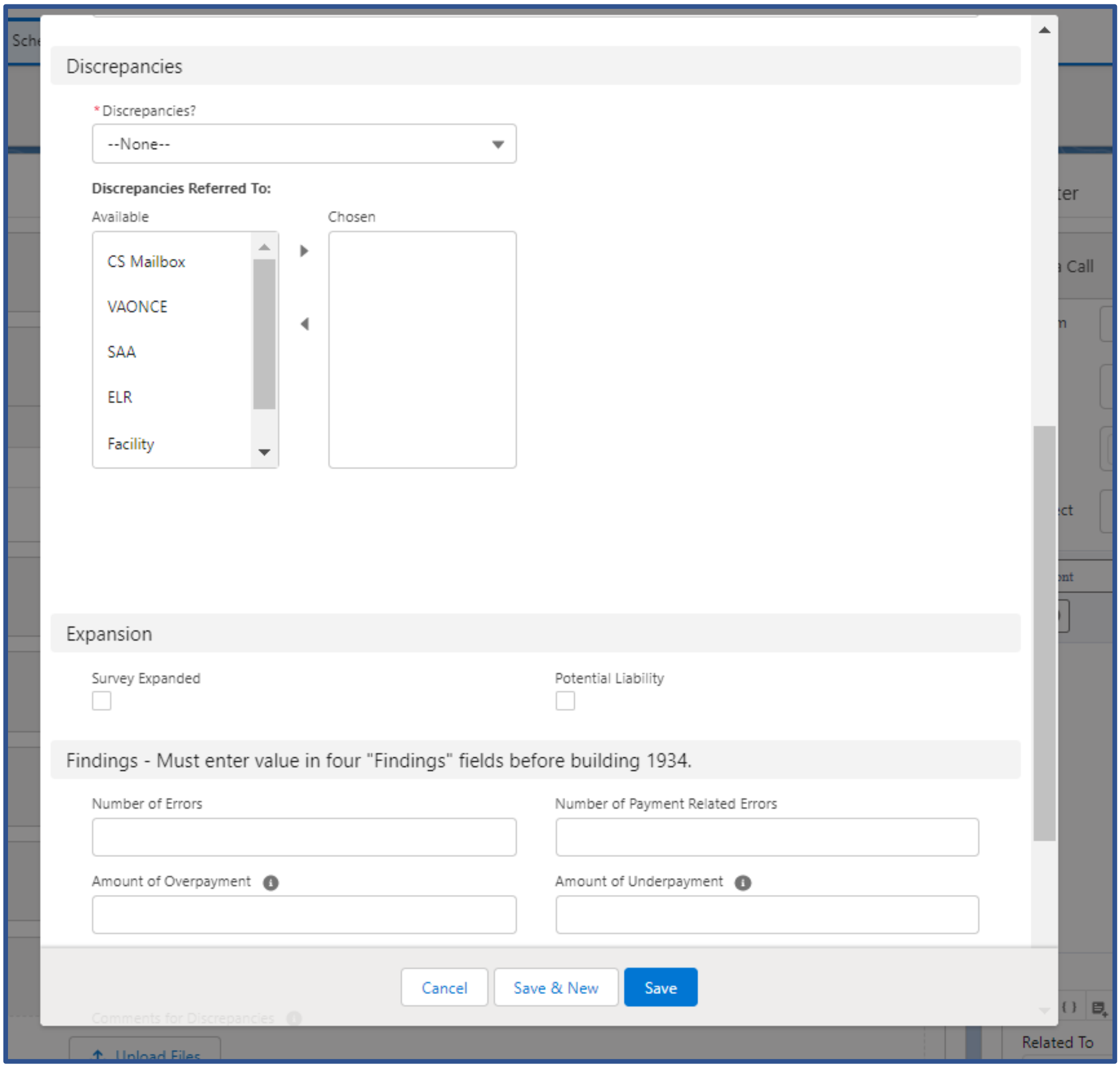
Select Discrepancies, Expansion, and Liability

Note: Refer to the following for guidance on Discrepancies, Expansion, and Liability.

Discrepancies: Reporting errors, processing errors, and any errors that are not consistent with the student's academic record, and school finance records.

Expansion: 100 Percent Review. If all records are reviewed as part of the initial sample, the survey will not be regarded as a 100 percent review. This term is reserved for surveys which require expansion beyond the original sample. However, all decisions must be in line with the instructions laid out in VACO policy advisory.

Liability: Actions in cases indicating submission of false, misleading, or fraudulent claims or statements. For any potential liabilities, see your Chief Education Liaison Officer.



E*F*orce-C&L for Surveyors

Survey Process Step 1:

Enter New Survey Visit and Findings Data

Overview of Survey Statuses

The **Survey Status** field on the **Schedule for Facilities** Detail page changes from ‘Pending’ to ‘In Progress’ once the **Input Survey Visit and Findings Information** form is initiated. In addition to the overall **Survey Status**, there are other status types associated with the process of entering Survey Visit and Findings Information, as described in the following table. Notice the different status types under Survey Visit & Findings Status with each step of the Input Survey Visit & Findings Information process. For example, the status ‘Visited’ is given with minimal required fields.

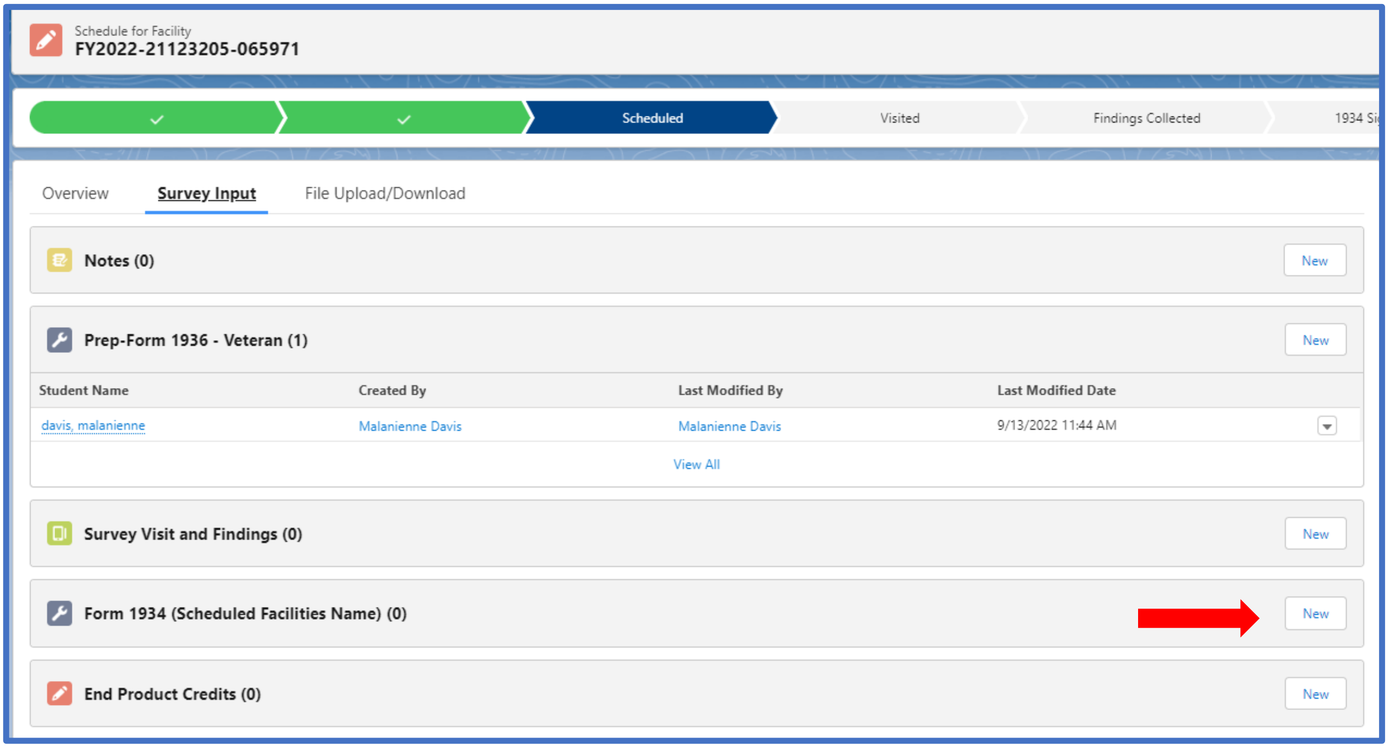
Step	FY Status	Survey Visit & Findings Status	Survey Status	Survey Control Status
Enter date Site Visit Began/Completed, # of Veterans Attending/Files Reviewed	Scheduled	Visited	In Progress	Not applicable
Discrepancies?/ Discrepancies Referred To:	Scheduled	Visited	In Progress	Not applicable
Survey Expanded checkbox is checked	Scheduled	Expanded	In Progress	Not applicable
Potential Liability checkbox is checked	Scheduled	Under Liability Review	In Progress	Not applicable
# of Errors/Payment Related Errors, Amount of Overpayment/Underpayment	Scheduled	Findings Collected	In Progress	Not applicable

EForce-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Select the New Button to Complete Form 1934

Next, enter information to complete **Form 1934**. From your assigned **Schedule for Facility Detail** page, scroll down to view the **Form 1934** section**.**

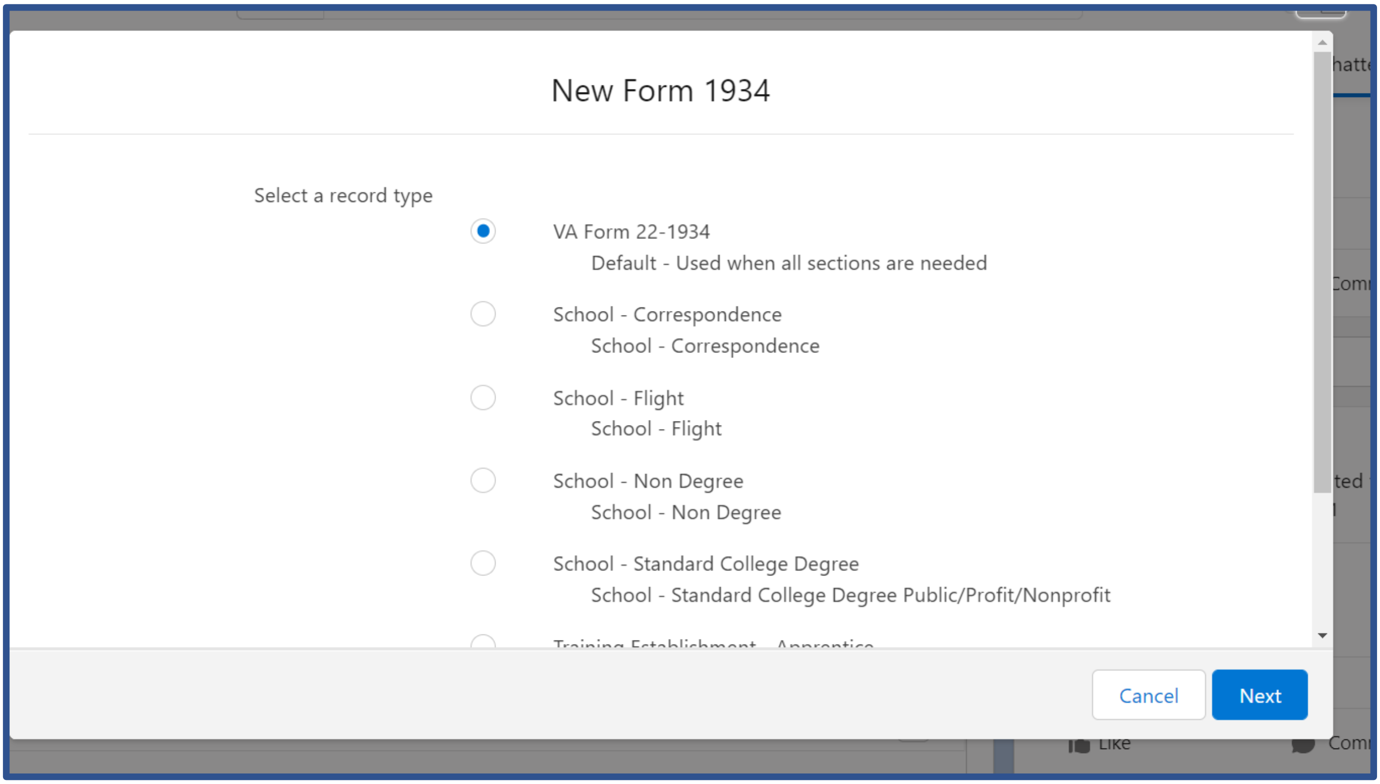


E*F*orce-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Select a Record Type

Select the appropriate type of facility. The resulting form will display different fields based on your selection here. There are different facility types to select from as shown below. For example, if the user selects “Flight school” as a type it will grey out areas not required for the facility type on that form. If you are unsure, use the default value.

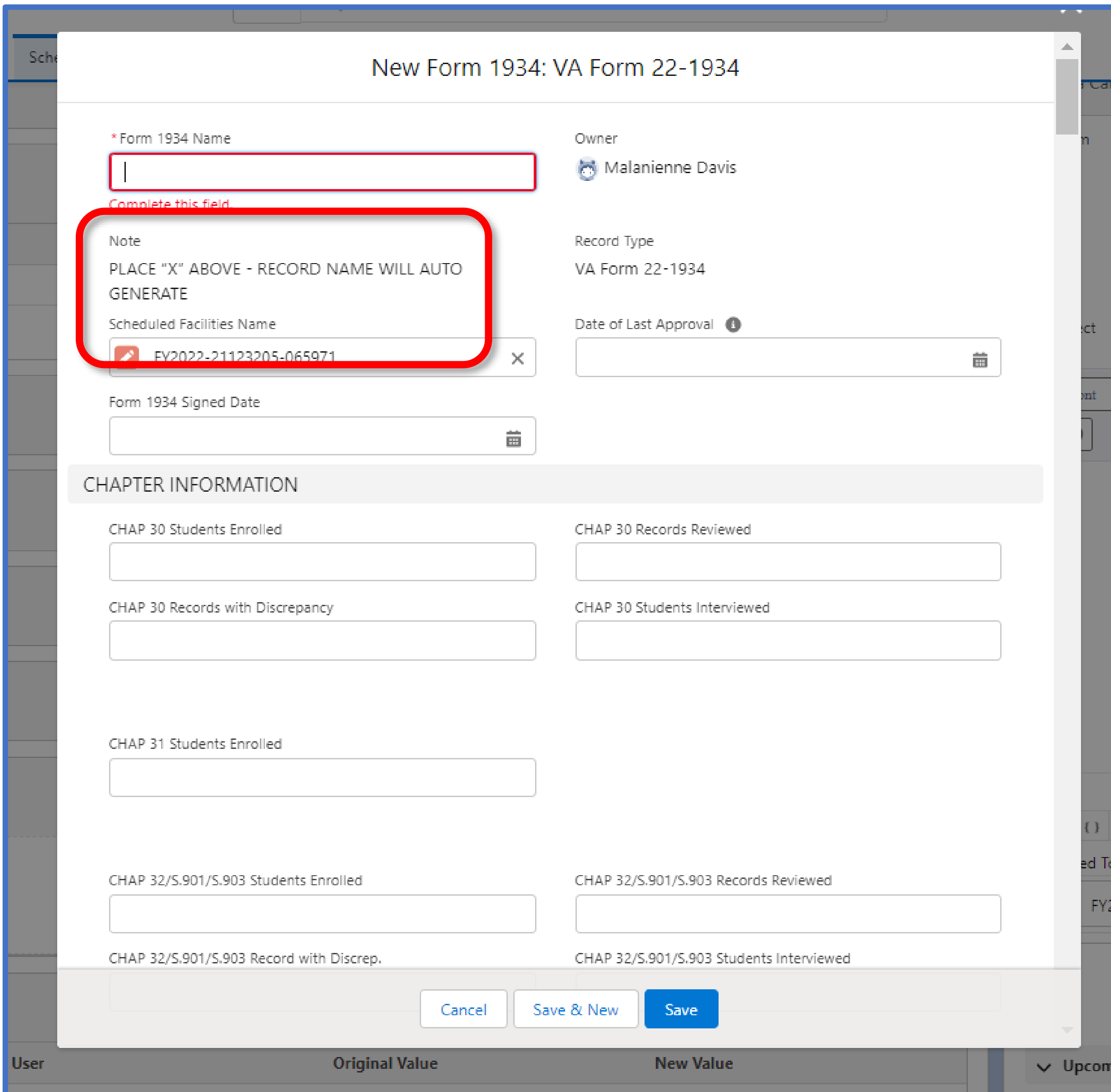


EForce-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Auto-Generation of the Form 1934 Name

Select the default **Form type - VA Form 22 - 1934**. Enter all information for **Form 1934** as you would in accordance with **M22-4, Part X, 7.02**. Users must place an X in the **Form 1934 Name** field so that the system will auto-populate the **Form 1934 Name**. Use the scroll bar to scroll down the form to continue inputting the required information. User must place an X in the **Form 1934 Name** field so the system can automatically generate the record name.



EForce-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Complete Form 1934

Continue entering all required information for **Form 1934.** Enter **Prior Survey, Current Survey, Schools Only,** and **Training Establishments Only** data as needed**.** Use the scroll bar to scroll down the form.

CHAP 32/S.901/S.903 Students Enrolled

CHAP 32/S.901/S.903 Records Reviewed

CHAP 32/S.901/S.903 Record with Discrep.

CHAP 32/S.901/S.903 Students Interviewed

CHAP 33/NCS Students Enrolled

CHAP 33/NCS Records Reviewed

CHAP 33/NCS Records with Discrepancy

CHAP 33/NCS Students Interviewed

CHAP 35 Students Enrolled

CHAP 35 Records Reviewed

CHAP 35 Records with Discrepancy

CHAP 35 Students Interviewed

CHAP 1606 Students Enrolled

CHAP 1606 Records Reviewed

CHAP 1606 Records with Discrepancy

CHAP 1606 Students Interviewed

CHAP 1607 Students Enrolled

CHAP 1607 Records Reviewed

CHAP 1607 Records with Discrepancy

CHAP 1607 Students Interviewed

NON_VA Students Enrolled

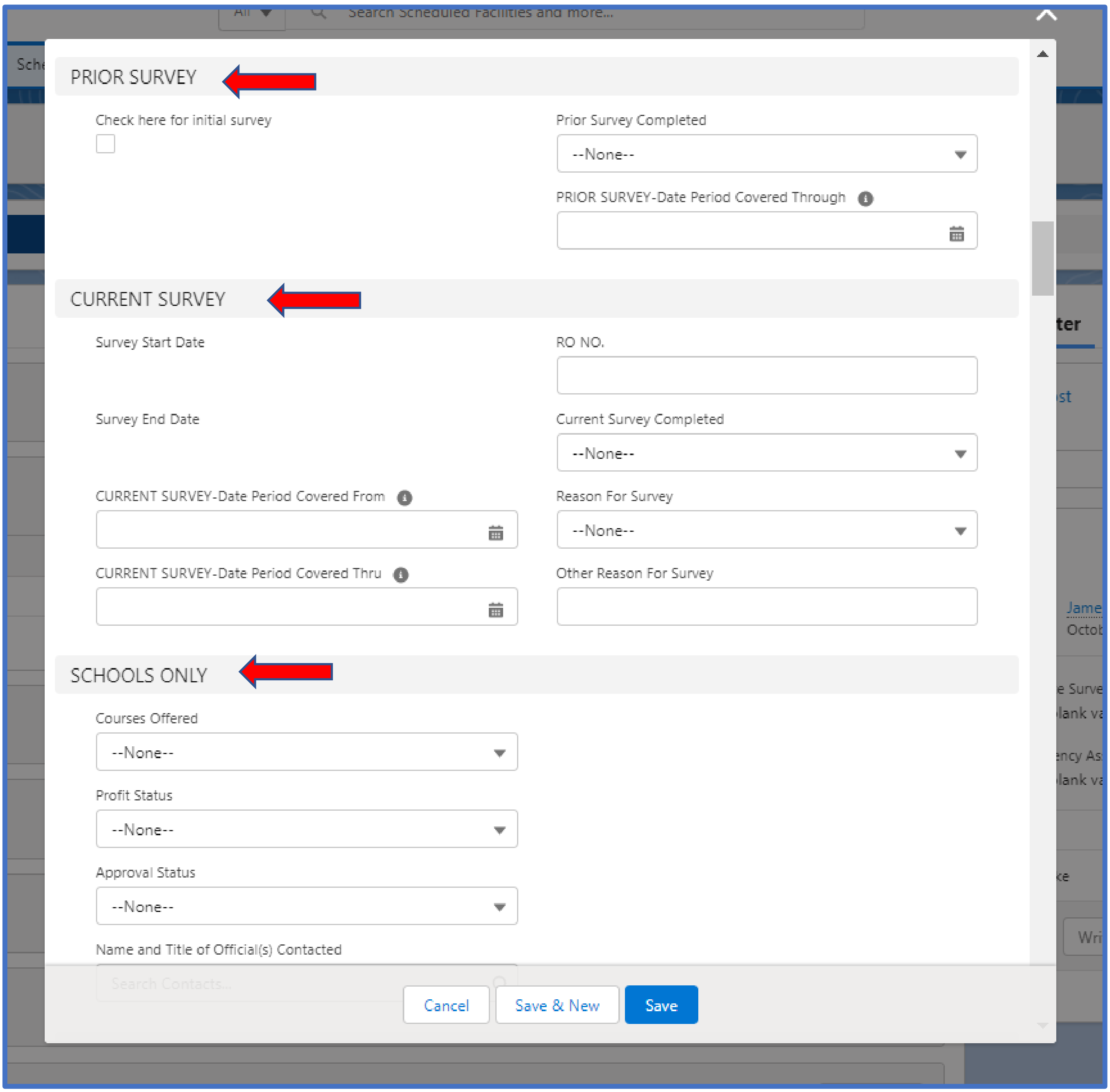
NON-VA Records Reviewed

NON-VA Records with Discrepancy

NON_VA Students Interviewed

Complete Form 1934, continued

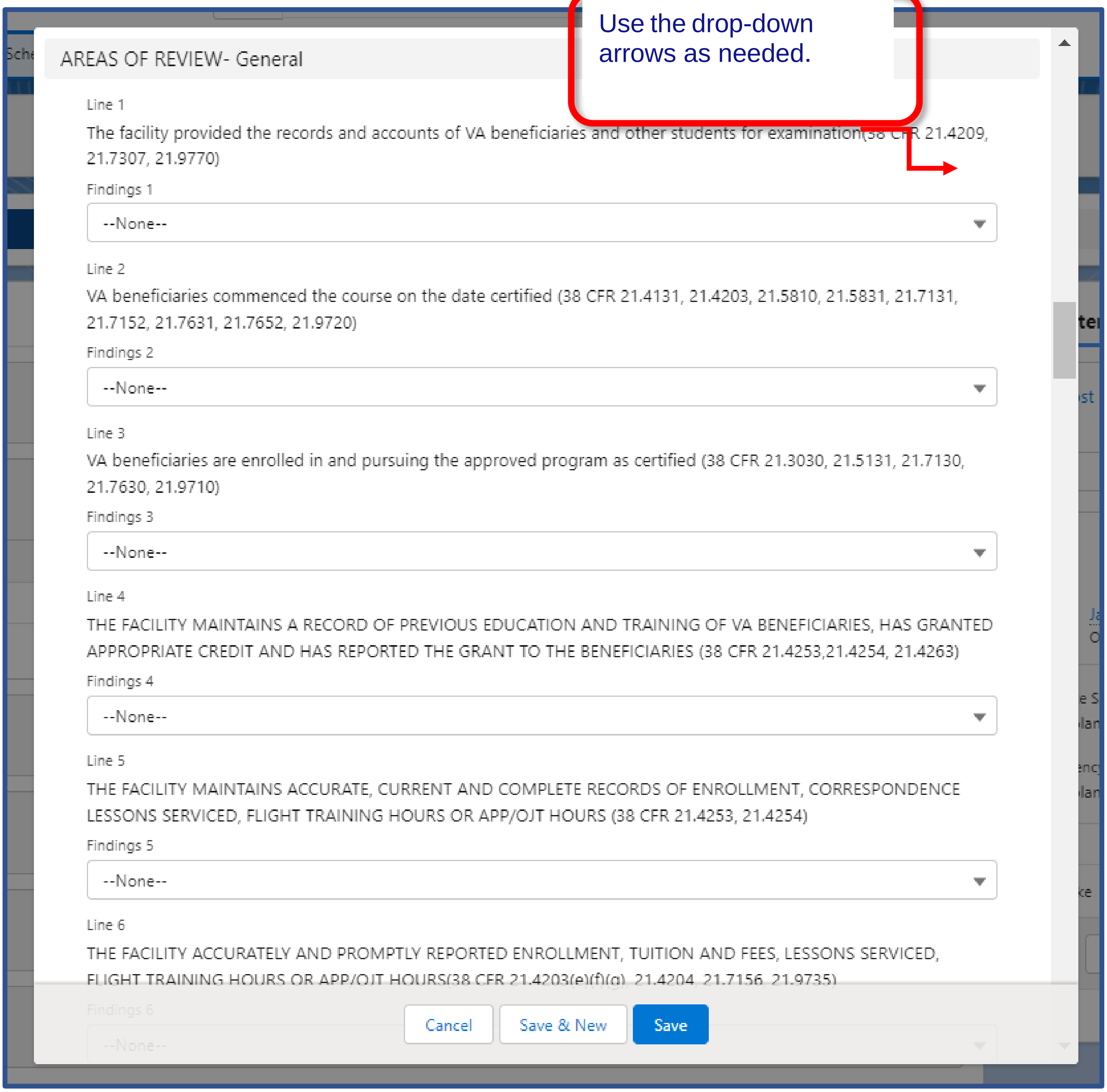
Continue entering all required information for **Form 1934.** Enter **Prior Survey, Current Survey, Schools Only,** and **Training Establishments Only** data as needed**.** Use the scroll bar to scroll down the form.



Select Findings for Areas of Review

Continue entering all required information for **Form 1934.** Use the scroll bar to scroll down the form.

Use the drop-down arrows as needed.



AREAS OF REVIEW- General

Line 1

The facility provided the records and accounts of VA beneficiaries and other students for examination(38 CFR 21.4209, 21.7307, 21.9770)

Findings 1

--None--

Line 2

VA beneficiaries commenced the course on the date certified (38 CFR 21.4131, 21.4203, 21.5810, 21.5831, 21.7131, 21.7152, 21.7631, 21.7652, 21.9720)

Findings 2

--None--

Line 3

VA beneficiaries are enrolled in and pursuing the approved program as certified (38 CFR 21.3030, 21.5131, 21.7130, 21.7630, 21.9710)

Findings 3

--None--

Line 4

THE FACILITY MAINTAINS A RECORD OF PREVIOUS EDUCATION AND TRAINING OF VA BENEFICIARIES, HAS GRANTED APPROPRIATE CREDIT AND HAS REPORTED THE GRANT TO THE BENEFICIARIES (38 CFR 21.4253,21.4254, 21.4263)

Findings 4

--None--

Line 5

THE FACILITY MAINTAINS ACCURATE, CURRENT AND COMPLETE RECORDS OF ENROLLMENT, CORRESPONDENCE LESSONS SERVICED, FLIGHT TRAINING HOURS OR APP/OJT HOURS (38 CFR 21.4253, 21.4254)

Findings 5

--None--

Line 6

THE FACILITY ACCURATELY AND PROMPTLY REPORTED ENROLLMENT, TUITION AND FEES, LESSONS SERVICED, FLIGHT TRAINING HOURS OR APP/OJT HOURS(38 CFR 21.4203(e)(f)(g), 21.4204, 21.7156, 21.9735)

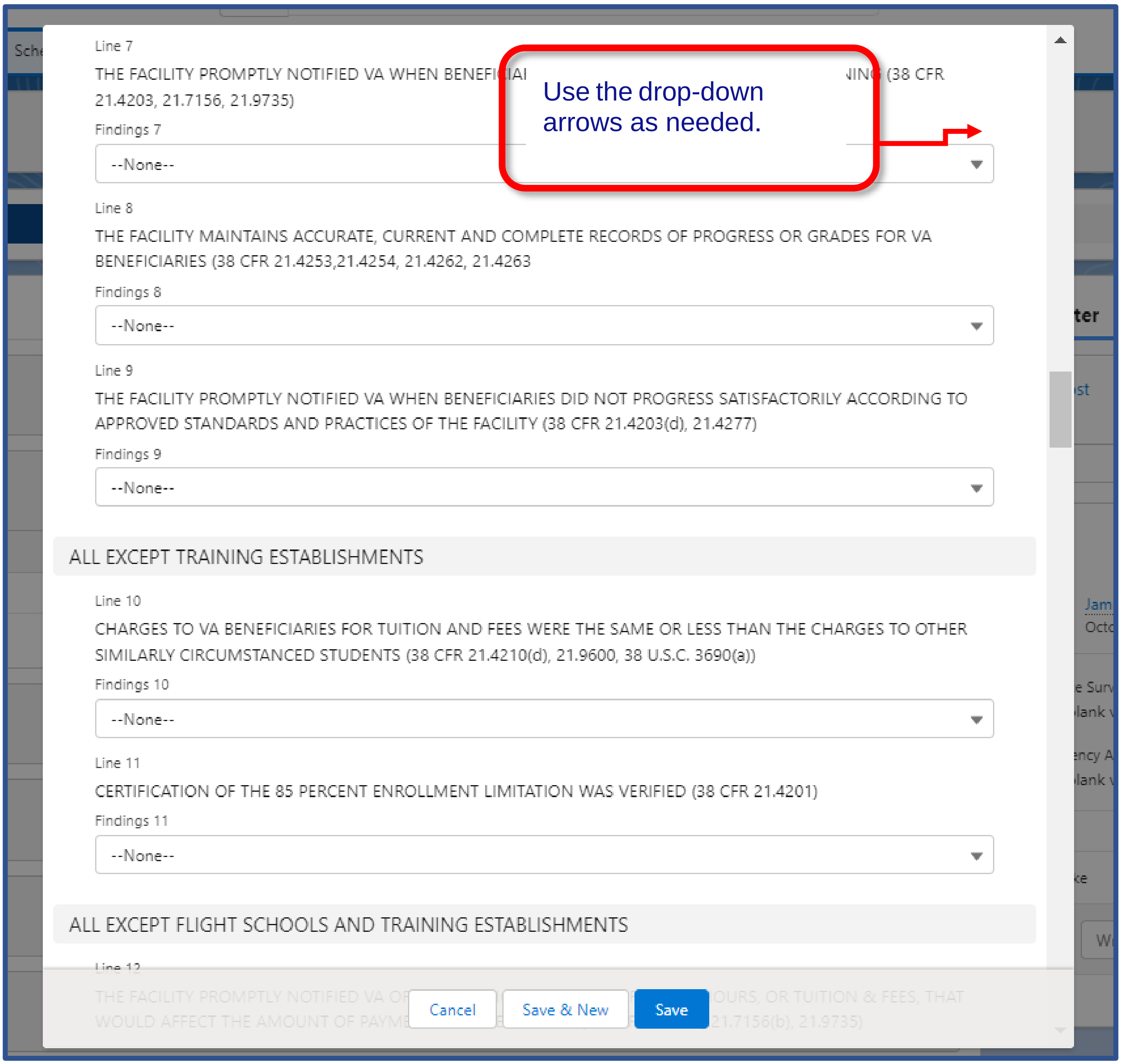
Findings 6

--None--

Cancel | Save & New | Save

Select Findings for Areas of Review, continued

Continue entering all required information for **Form 1934.** Use the scroll bar to scroll down the form.

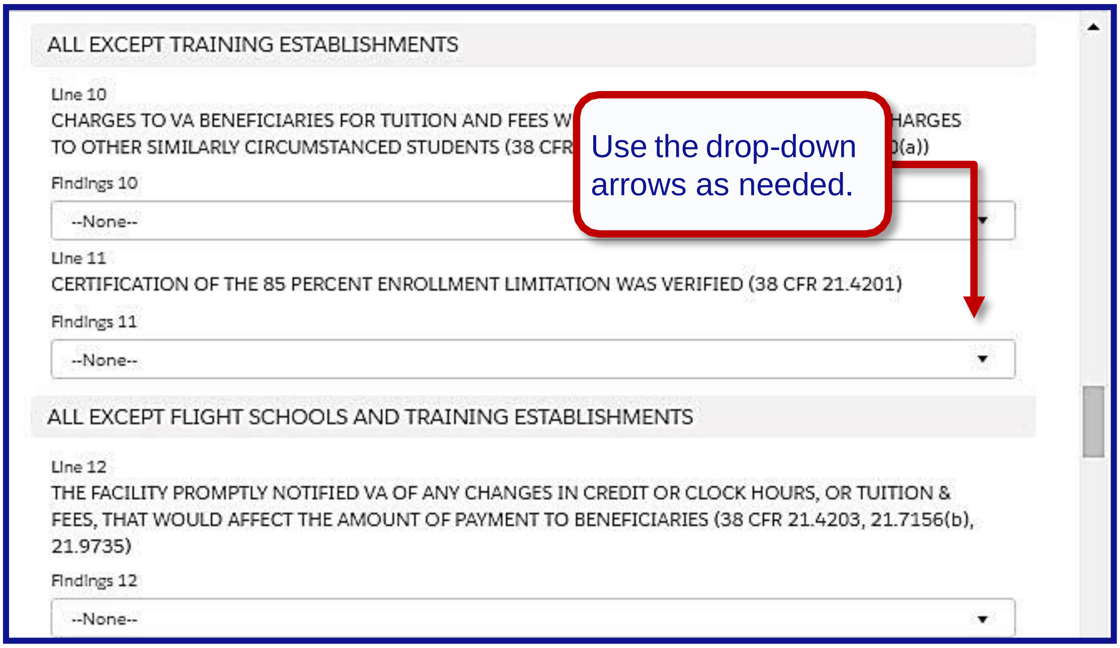


EForce-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Select Findings for Other Facilities

Continue entering all required information for **Form 1934.** Use the scroll bar to scroll down the form.



ALL EXCEPT TRAINING ESTABLISHMENTS

Line 10

CHARGES TO VA BENEFICIARIES FOR TUITION AND FEES W HARGES TO OTHER SIMILARLY CIRCUMSTANCED STUDENTS (38 CFR 0(a))

Findings 10

--None--

Line 11

CERTIFICATION OF THE 85 PERCENT ENROLLMENT LIMITATION WAS VERIFIED (38 CFR 21.4201)

Findings 11

--None--

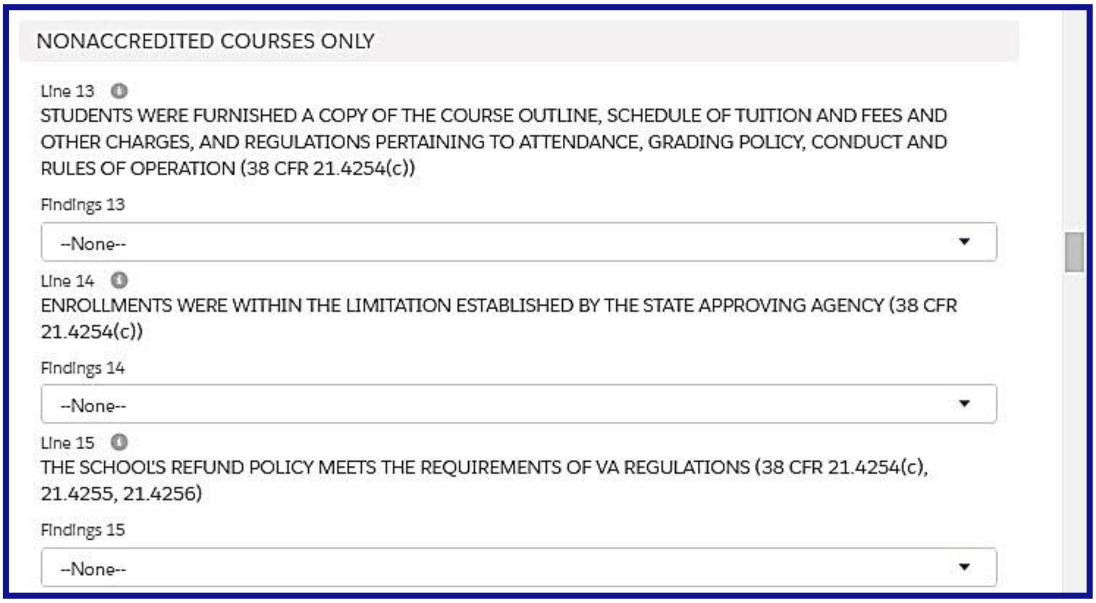
ALL EXCEPT FLIGHT SCHOOLS AND TRAINING ESTABLISHMENTS

Line 12

THE FACILITY PROMPTLY NOTIFIED VA OF ANY CHANGES IN CREDIT OR CLOCK HOURS, OR TUITION & FEES, THAT WOULD AFFECT THE AMOUNT OF PAYMENT TO BENEFICIARIES (38 CFR 21.4203, 21.7156(b), 21.9735)

Findings 12

--None--



NONACCREDITED COURSES ONLY

Line 13

STUDENTS WERE FURNISHED A COPY OF THE COURSE OUTLINE, SCHEDULE OF TUITION AND FEES AND OTHER CHARGES, AND REGULATIONS PERTAINING TO ATTENDANCE, GRADING POLICY, CONDUCT AND RULES OF OPERATION (38 CFR 21.4254(c))

Findings 13

--None--

Line 14

ENROLLMENTS WERE WITHIN THE LIMITATION ESTABLISHED BY THE STATE APPROVING AGENCY (38 CFR 21.4254(c))

Findings 14

--None--

Line 15

THE SCHOOL'S REFUND POLICY MEETS THE REQUIREMENTS OF VA REGULATIONS (38 CFR 21.4254(c), 21.4255, 21.4256)

Findings 15

--None--

*E*Force-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Select Findings for Correspondence Schools and Flight Schools

Continue entering all required information for **Form 1934.** Use the scroll bar to scroll down the form.

CORRESPONDENCE SCHOOLS ONLY

Line 16
STUDENTS AFFIRMED THE ENROLLMENT AGREEMENT AFTER THE EXPIRATION OF 10 FULL DAYS AFTER THE DAY ON WHICH THE AGREEMENT WAS SIGNED(38 CF

Findings 16

--None--

Use the drop-down arrows as needed.

Line 17
SUPPLIES, IF PART OF THE APPROVED COURSE, WERE FURNISHED TO STUDENTS (38 CFR 21.4254, 21.4255)

Findings 17

--None--

Line 18
SCHOOL RECORDS SHOW THAT VA BENEFICIARIES ARE PAYING THEIR SHARE OF THE APPROVED CHARGES AND THAT NON-VA STUDENTS ARE PAYING 100 PERCENT OF THE ESTABLISHED CHARGES (38 CFR 21.4210(d))

Findings 18

--None--

Line 19
NORMAL COMPLETION TIME FOR THE APPROVED COURSES IS AT LEAST SIX-MONTHS (38 CFR 21.4256)

Findings 19

--None--

FLIGHT SCHOOLS ONLY

Line 20
SCHOOL RECORDS SHOW THAT BENEFICIARIES HELD AN UNLIMITED PRIVATE PILOT'S LICENSE OR HIGHER RATING BEFORE ENROLLMENT (38 CFR 21.4263)

Findings 20

--None--

Line 21
SCHOOL RECORDS SHOW THAT BENEFICIARIES HELD A CURRENT MEDICAL CERTIFICATE OF THE APPROPRIATE CLASS BEFORE AND DURING ENROLLMENT (38 CFR 21.4263)

Findings 21

--None--

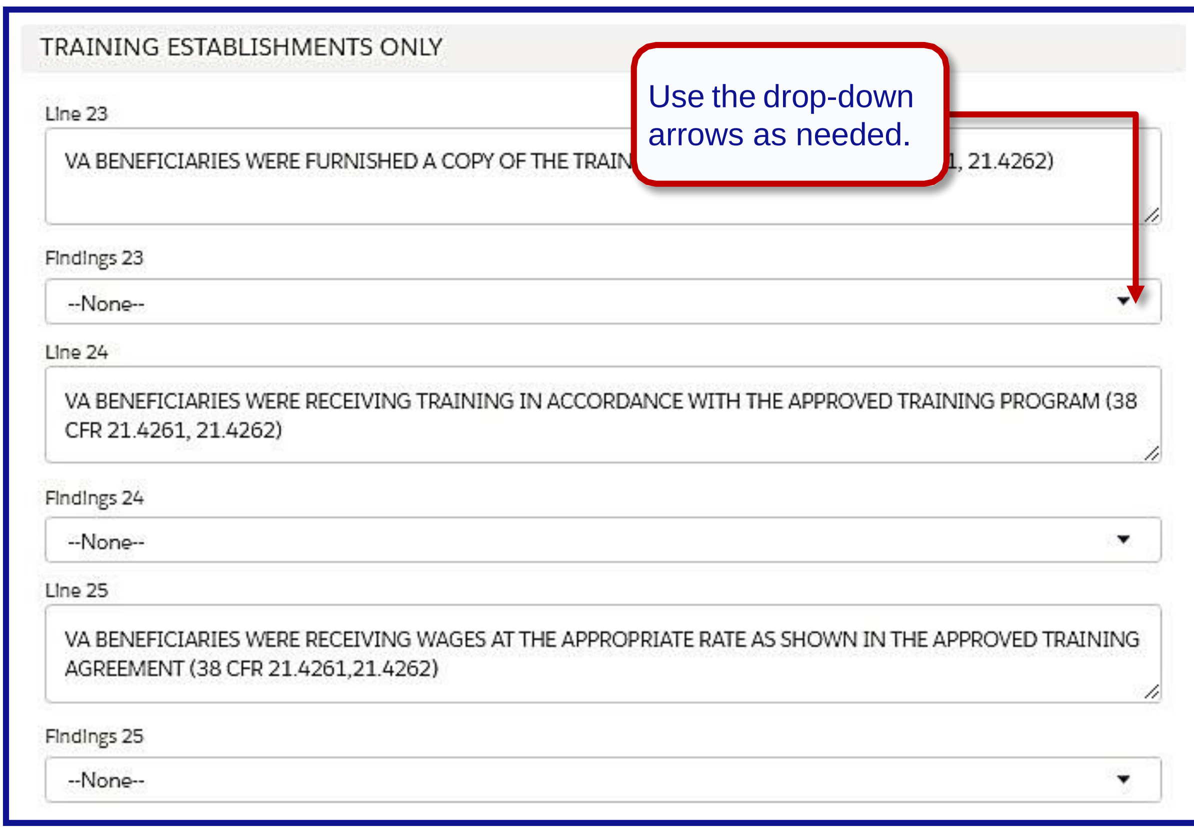
Line 22
SCHOOL RECORDS SHOW THAT VA BENEFICIARIES ARE PAYING THEIR SHARE OF THE COST OF TRAINING RECEIVED AND THAT NON-VA STUDENTS ARE PAYING 100 PERCENT OF THE COST OF TRAINING RECEIVED (38 CFR 21.4263)

Findings 22

--None--

Select Findings for Training Establishments

Continue entering all required information for **Form 1934.** Use the scroll bar to scroll down the form.



EForce-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Select Findings for Additional Areas of Review

Continue entering all required information for **Form 1934.** Use the scroll bar to scroll down the form.

ADDITIONAL AREAS OF REVIEW

Use drop-down arrows as needed to select a finding.

Line 26
THE FACILITY HAS CORRECTED AND NOT REPEATED ANY DISCREPANCY FOUND ON THE PRIOR SURVEY, OTHER THAN AN OCCASIONAL CLERICAL ERROR (38 CFR 21.4210(d))

Findings 26

--None--

Line 27A
ADVERTISING, SALES OR ENROLLMENT PRACTICES OF ANY TYPE (38 CFR 21.4252(b)(h), 21.4254(c))

Findings 27A

--None--

Line 27B
POWER OF ATTORNEY AND NONASSIGNABILITY OF BENEFITS (38 CFR 21.4146, 21.9680)

Findings 27B

--None--

Line 27C
INDEPENDENT STUDY (38 CFR 21.4267)

Findings 27C

--None--

Line 27D
PRACTICAL TRAINING (38 CFR 21.4265)

Findings 27D

--None--

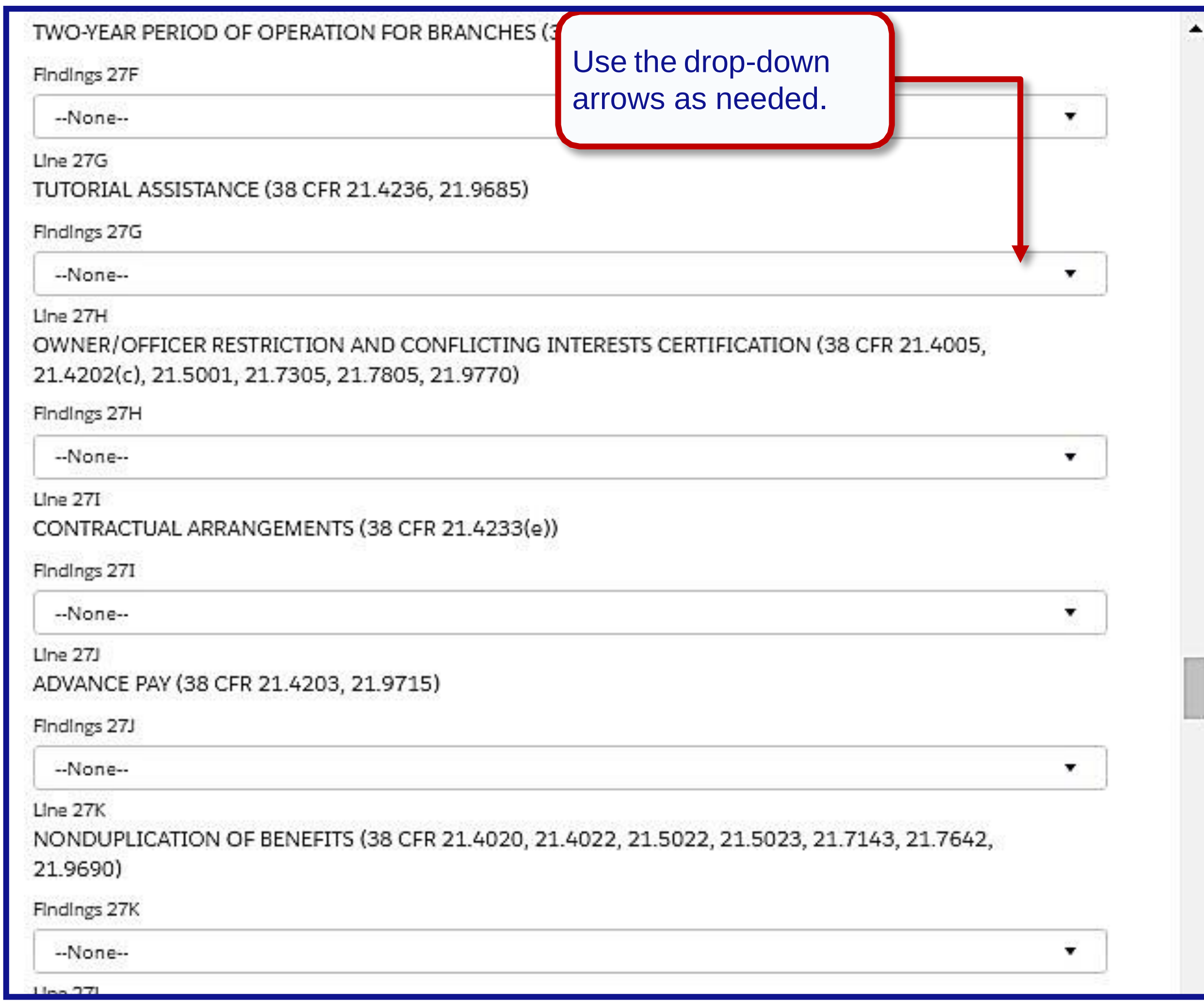
Line 27E
COOPERATIVE COURSES AND FARM COOPERATIVE COURSES (38 CFR 21.4233, 21.4257, 21.4264)

Findings 27E

--None--

Select Findings for Additional Areas of Review, continued

Continue entering all required information for **Form 1934.** Use the scroll bar to scroll down the form.



TWO-YEAR PERIOD OF OPERATION FOR BRANCHES (3

Findings 27F

--None--

Line 27G

TUTORIAL ASSISTANCE (38 CFR 21.4236, 21.9685)

Findings 27G

--None--

Line 27H

OWNER/OFFICER RESTRICTION AND CONFLICTING INTERESTS CERTIFICATION (38 CFR 21.4005, 21.4202(c), 21.5001, 21.7305, 21.7805, 21.9770)

Findings 27H

--None--

Line 27I

CONTRACTUAL ARRANGEMENTS (38 CFR 21.4233(e))

Findings 27I

--None--

Line 27J

ADVANCE PAY (38 CFR 21.4203, 21.9715)

Findings 27J

--None--

Line 27K

NONDUPLICATION OF BENEFITS (38 CFR 21.4020, 21.4022, 21.5022, 21.5023, 21.7143, 21.7642, 21.9690)

Findings 27K

--None--

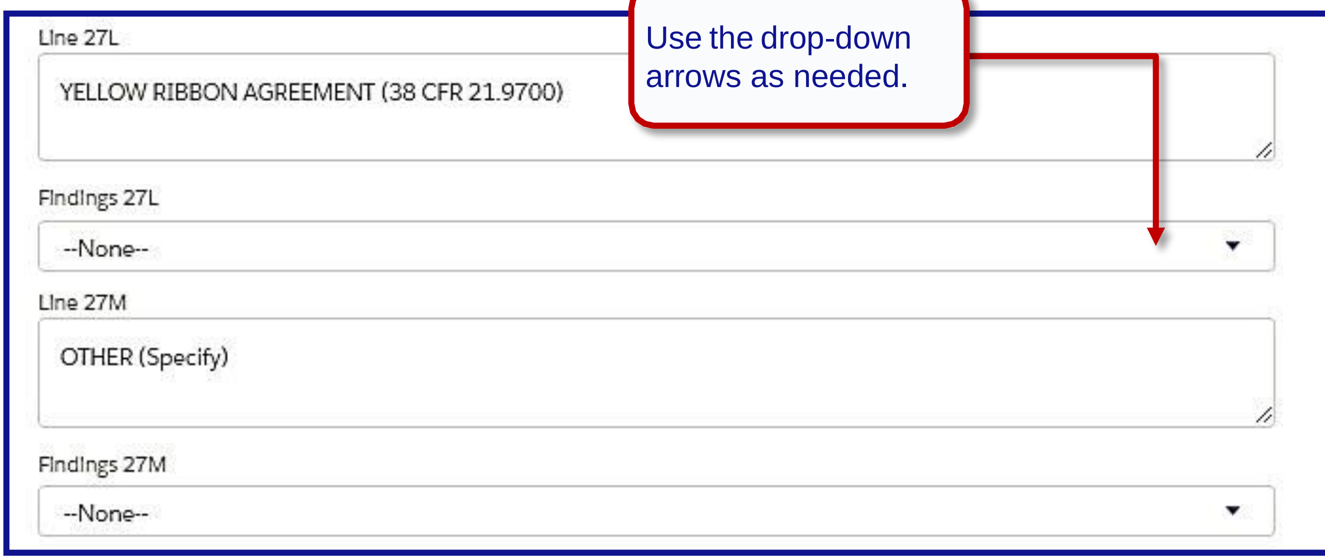
EForce-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Select Other Findings

Continue entering all required information for **Form 1934.** Use the scroll bar to scroll down the form.

Use the drop-down arrows as needed.



Line 27L

YELLOW RIBBON AGREEMENT (38 CFR 21.9700)

Findings 27L

--None--

Line 27M

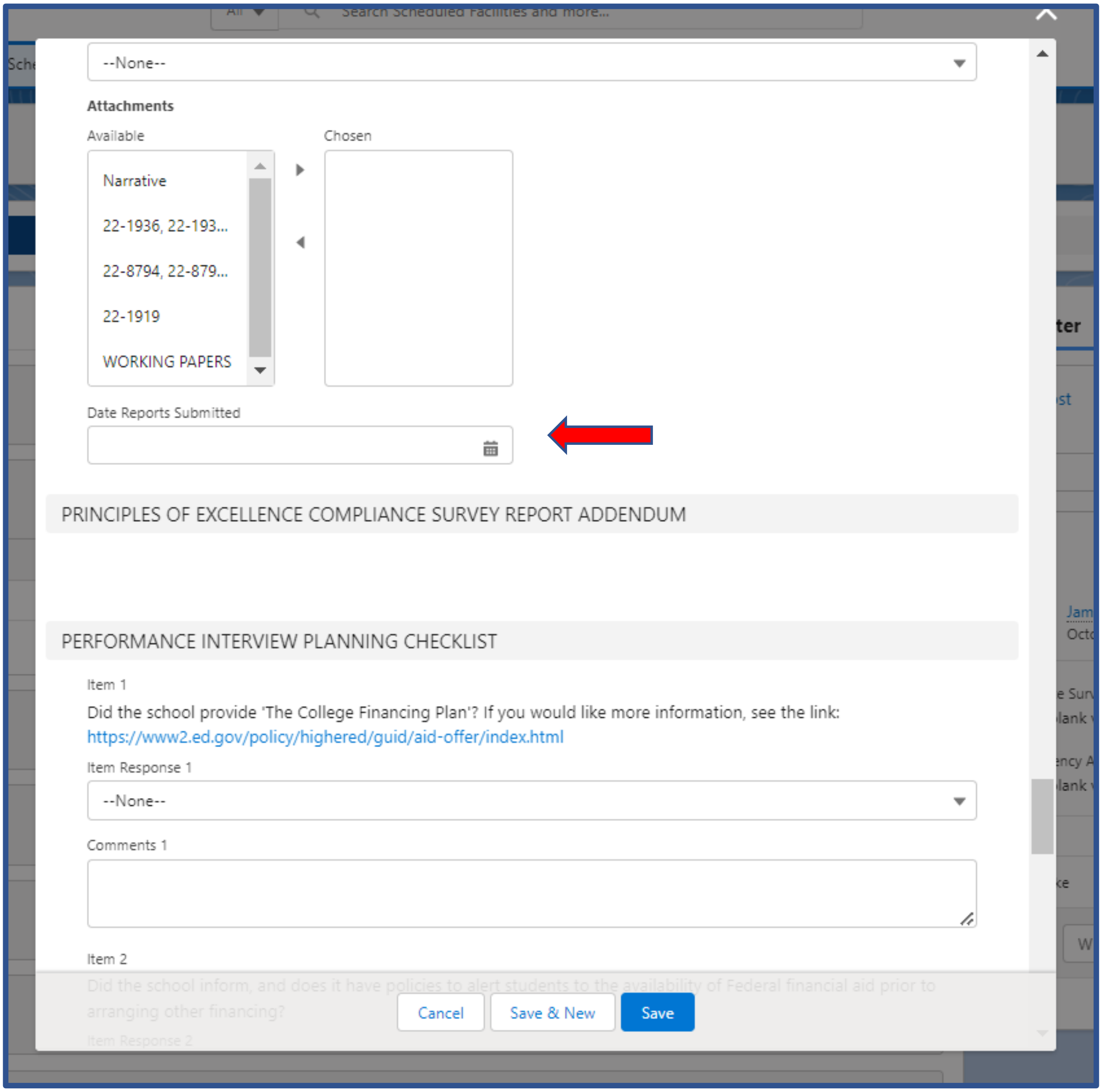
OTHER (Specify)

Findings 27M

--None--

Select Attachments and Add Signature

Continue entering all required information for **Form 1934.** Use the scroll bar to scroll down the form. Select **Available Attachments** as needed. To select multiple values in the Attachments field, hold down the control key on your keyboard and click on all the values you'd like to select.

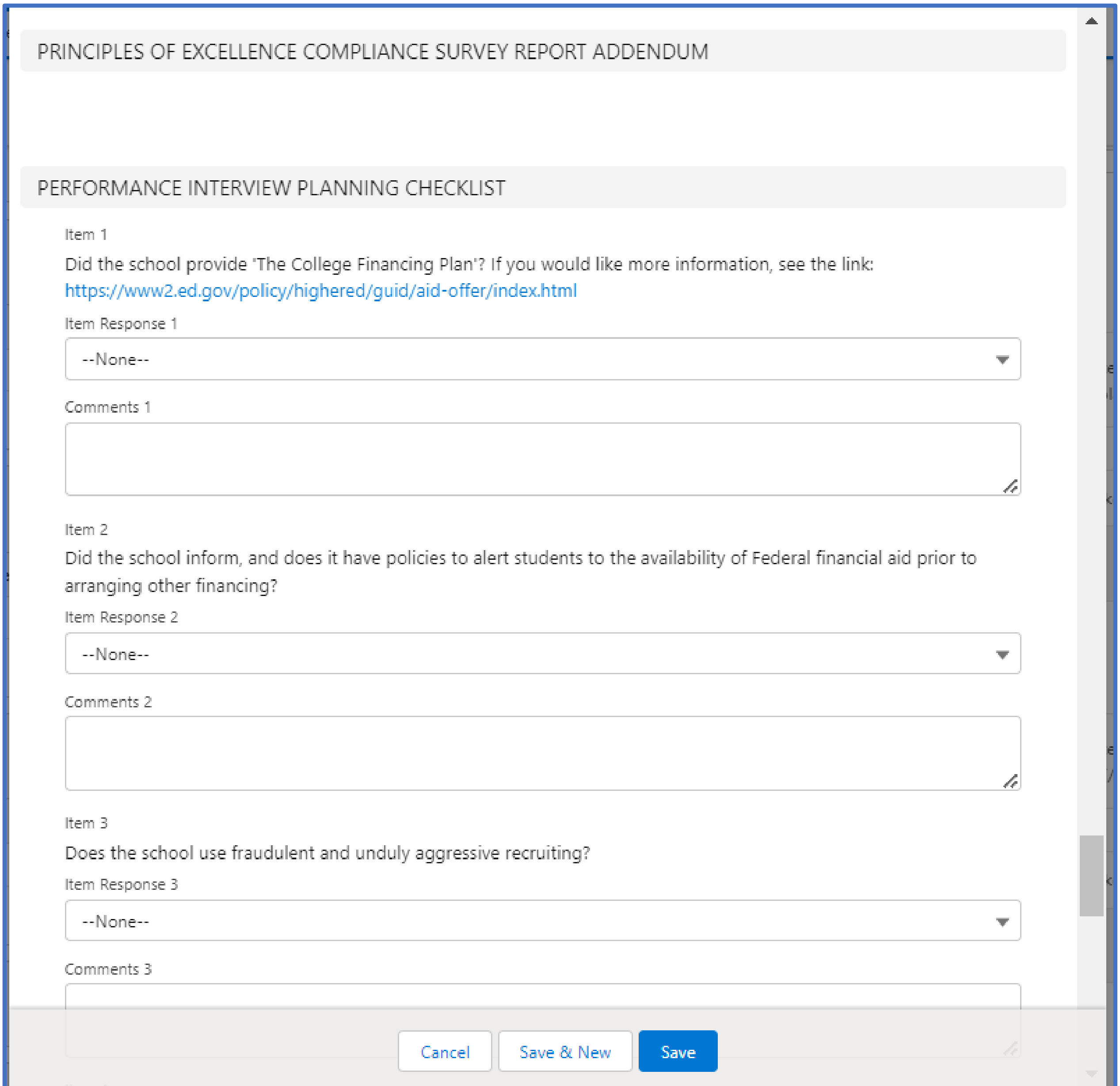


EForce-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Enter Performance Interview Planning Checklist Information

For schools in agreement with the **Principles of Excellence,** enter the **Performance Interview Planning Checklist** information. Use the scroll bar to locate all necessary fields and complete Form 1934.



PRINCIPLES OF EXCELLENCE COMPLIANCE SURVEY REPORT ADDENDUM

PERFORMANCE INTERVIEW PLANNING CHECKLIST

Item 1

Did the school provide 'The College Financing Plan'? If you would like more information, see the link: https://www2.ed.gov/policy/highered/guid/aid-offer/index.html

Item Response 1

--None--

Comments 1

Item 2

Did the school inform, and does it have policies to alert students to the availability of Federal financial aid prior to arranging other financing?

Item Response 2

--None--

Comments 2

Item 3

Does the school use fraudulent and unduly aggressive recruiting?

Item Response 3

--None--

Comments 3

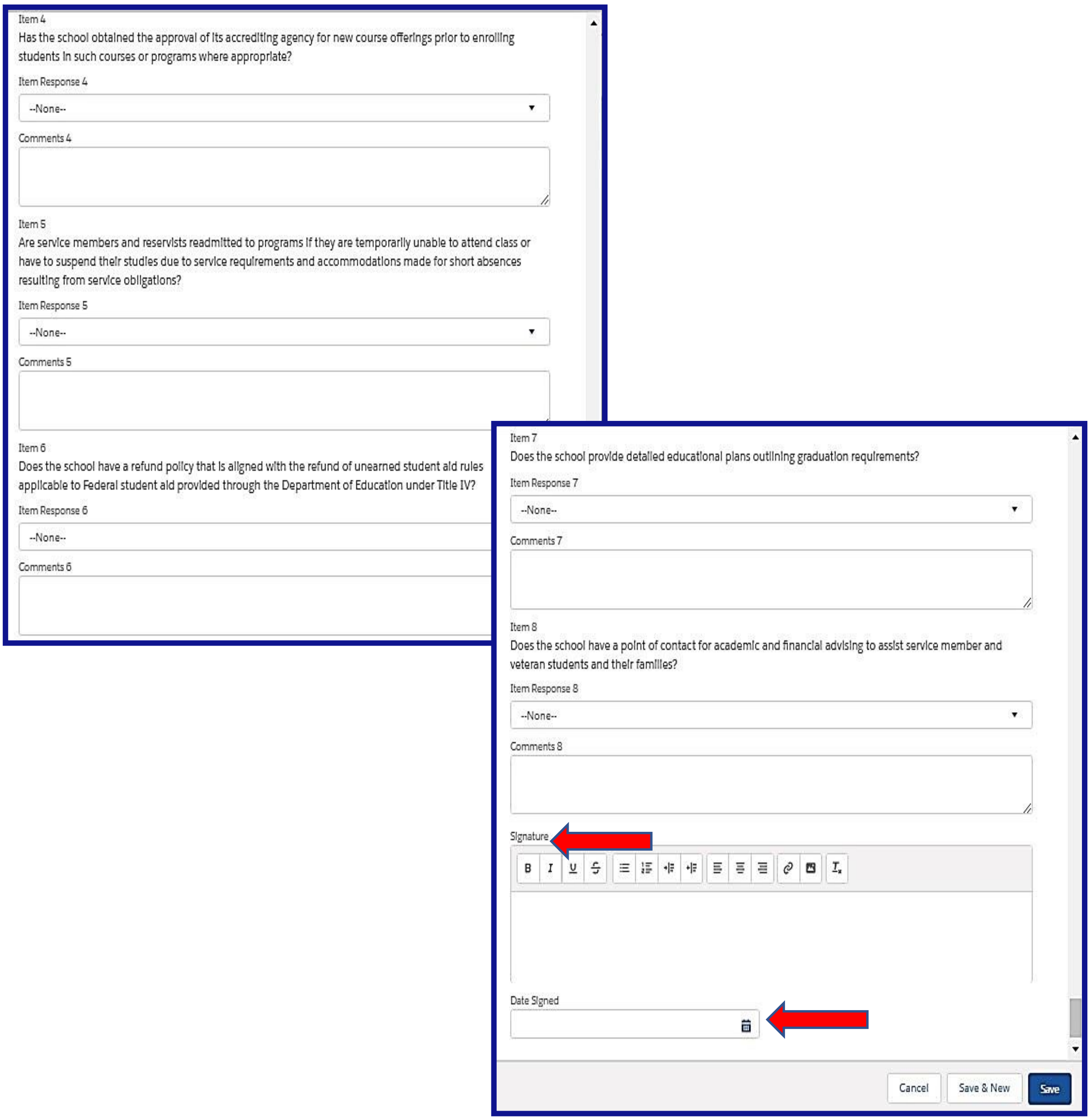
Cancel | Save & New | Save

EForce-C&L for Surveyors

Survey Process Step 2: Complete Form 1934

Enter Performance Interview Planning Checklist Information, continued

Enter the **Performance Interview Planning Checklist** information. Use the scroll bar to locate all necessary fields and complete Form 1934. Sign and date your form.

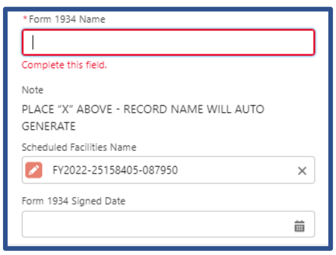


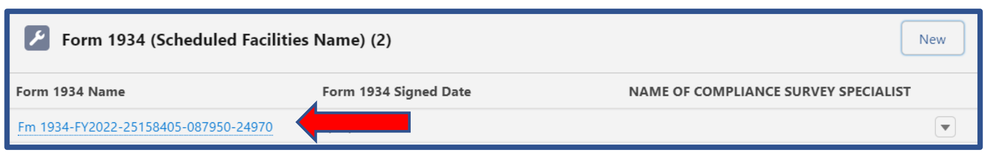
EForce-C&L for Surveyors

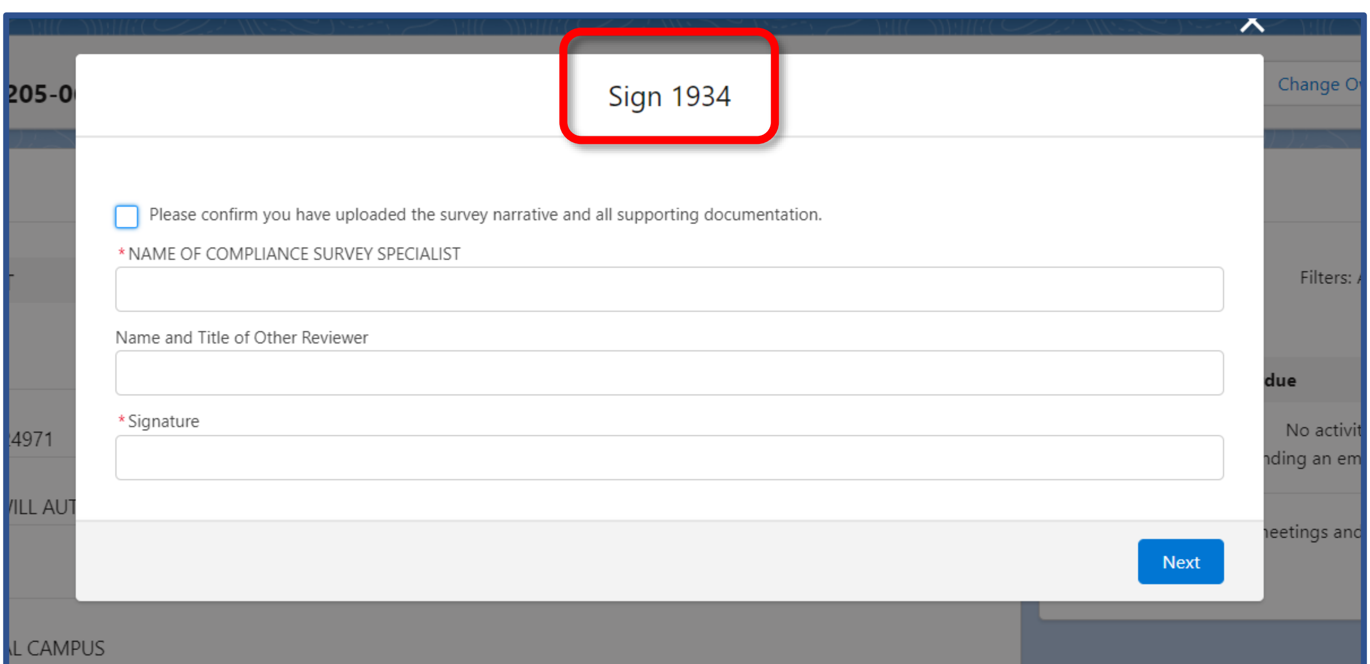
Survey Process Step 2: Complete Form 1934

Enter Signature and Date Signed

After the **Performance Interview Planning Checklist** information has been input, you will need to electronically sign the 1934 twice to finish closing out this portion of your 1934 input. At the bottom of the 1934 you will sign the form and click Save. Then from the survey input main screen, scroll down to your 1934 and click the blue hyperlink. Then in the upper right corner you will see an option to Sign 1934. Click on it and sign. **Note:** You cannot close and sign the 1934 until your "Survey Findings" data has been entered and saved. The Survey Visit and Findings status should be updated to "Findings Collected" before attempting to sign the 1934.

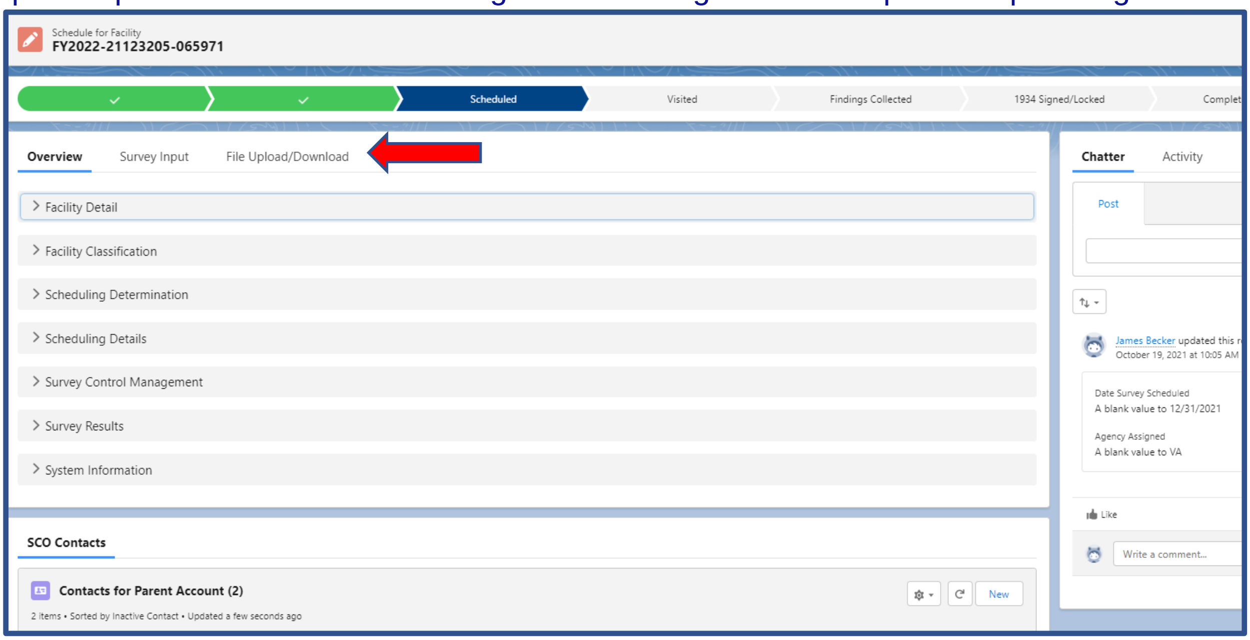


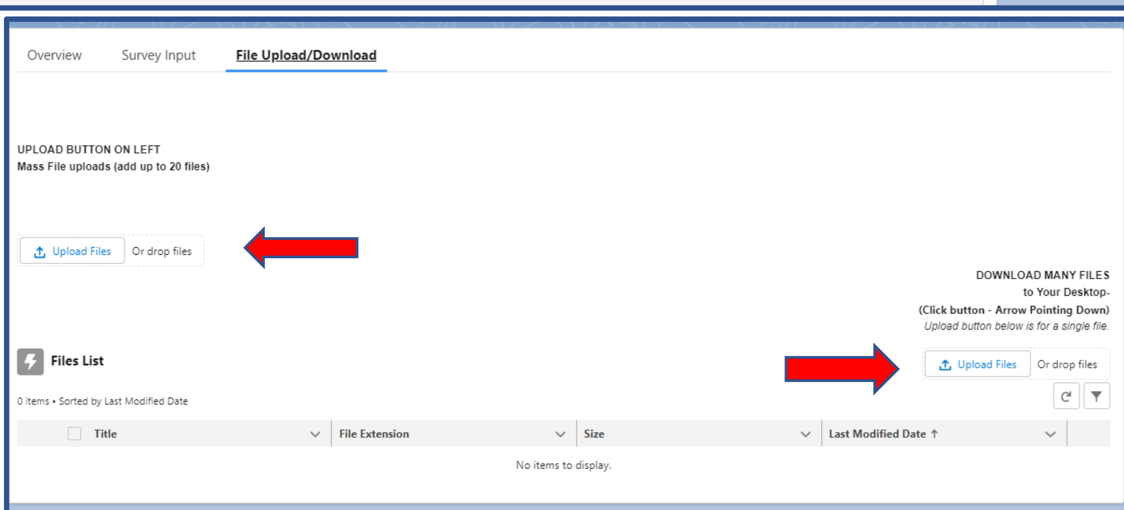




Upload Survey Files that Follow the Naming Convention

From your assigned **Schedule for Facility Detail** page, navigate to the right, to the **File Upload/Download** tab and click. Then either click the **Upload File** button or drop files directly from your computer to the **Files section**. Using the following naming convention, '**FiscalYear-FacilityCode-DocumentType**', upload scanned or electronic documents into E*Force*-C&L. For example: "FY2017-FacilityCode-1936-xxxx" (xxxx=Veteran last name); for transcripts use, "FY2017-FacilityCode-transcripts-xxxx" (xxxx=Veteran last name). See next page for more examples. Tip: Edit file names according to the naming convention prior to uploading the file.





E*F*orce-C&L for Surveyors

Survey Process Step 3: Upload Files for Your Survey

Name Survey Files Using the Naming Convention

Use the naming convention guideline, '**FiscalYear-FacilityCode-DocumentType'**, to name files prior to uploading them into E*F*orce-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 E*F*orce-C&L.

Guide	Example
FiscalYear-FacilityCode-VAForm-VeteranLastName	**FY17-10000038-1936-Johnson.doc**
FiscalYear-FacilityCode-1934	**FY17-10370095-1934.doc**
FiscalYear-FacilityCode-1919	**FY17-12034201-1919.xls**
FiscalYear-FacilityCode-SCOemail-VeteranLastName	**FY17-21063500-SCOemail.Kennedy.pdf**
FiscalYear-FacilityCode-Narrative	**FY17-10000039-Narrative.doc**

HINTS & TIPS

Using the above naming convention, name your files in advance of uploading into E*F*orce-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.

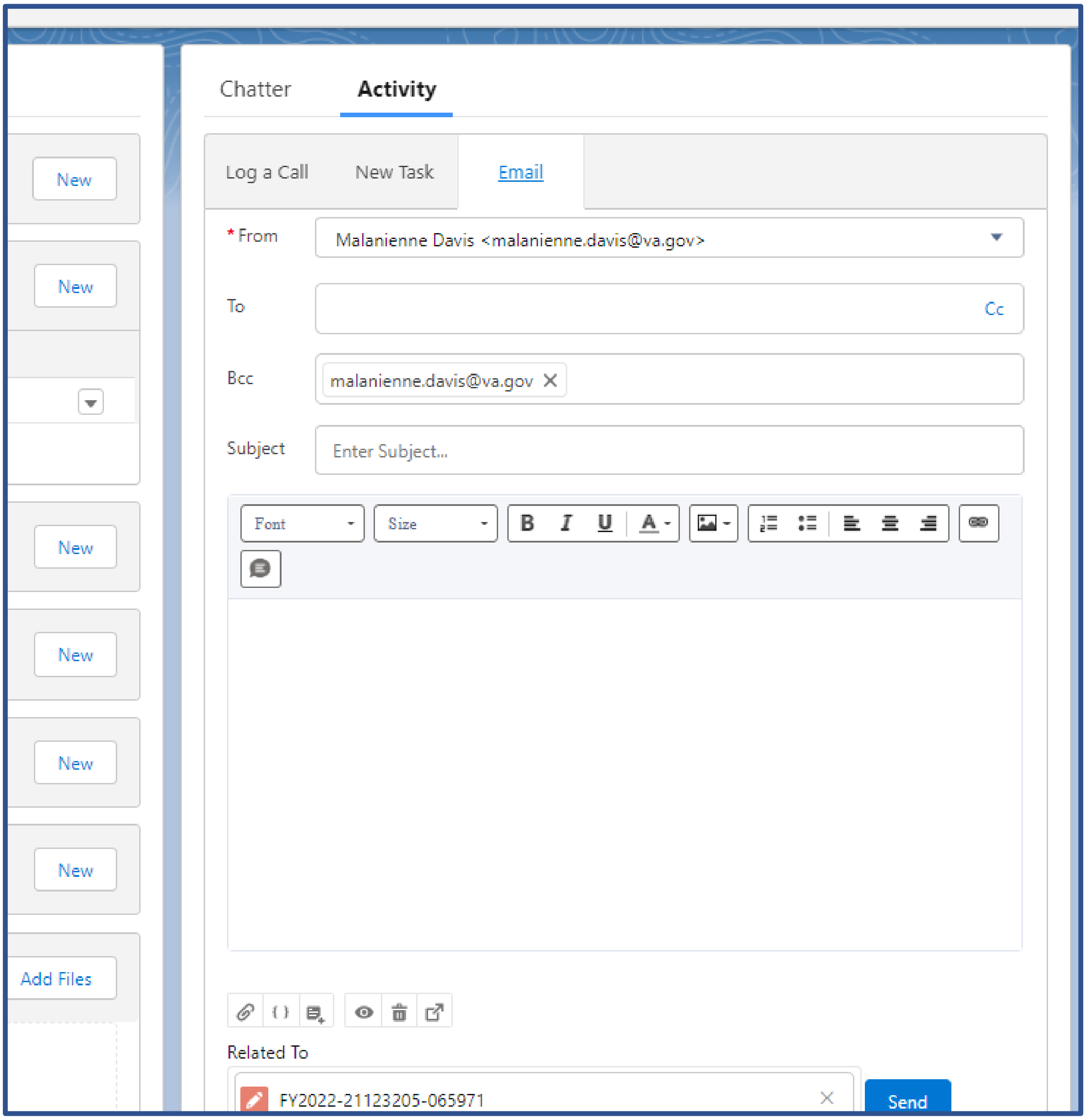
EForce-C&L for Surveyors

Survey Process Step 4:

Email Compliance & Liaison Findings Letter and Narrative

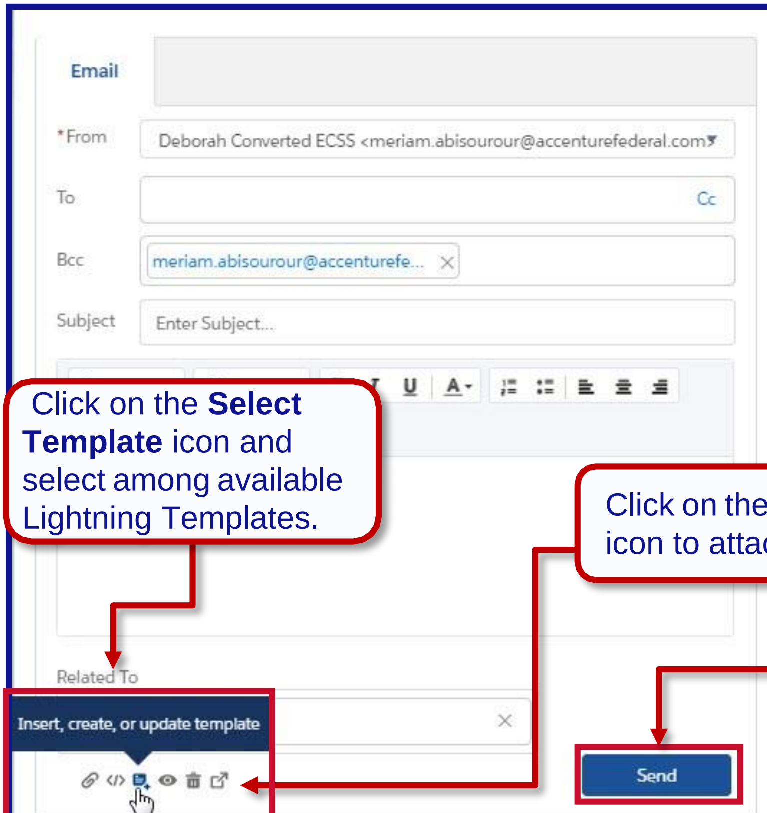
Send an Email from the Activity Panel

From the **Scheduled Facilities** detail page, navigate to the right, to the **Activity** Panel, and click **Activity**. In the **Email** panel, fill out all sections of the draft email to send an email to the SCO with survey results.



Send an Email with an Attachment for Compliance Survey Finding Letters

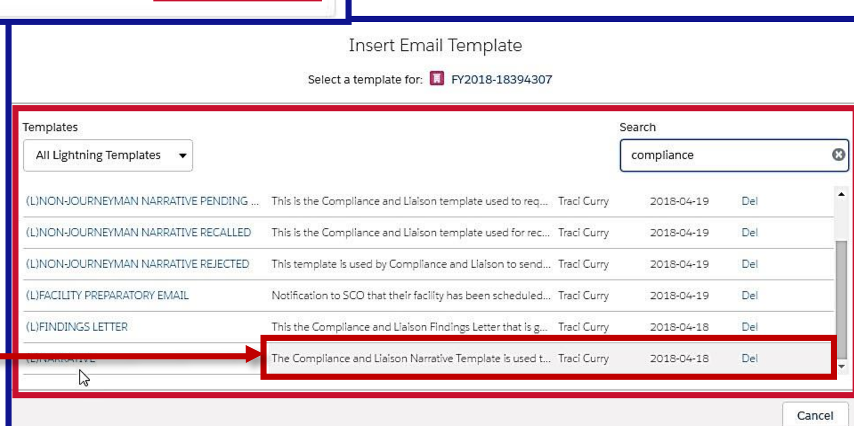
Sending email in E*F*orce-C&L is just like using Outlook or any other email application with the added benefit of maintaining all communications in one place, organized by Scheduled Facility. Enter all pertinent information as needed. Select the **Compliance and Liaison Findings Letter** email template, 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 Scheduled Facility**.**



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

Click on the paperclip icon to attach files.

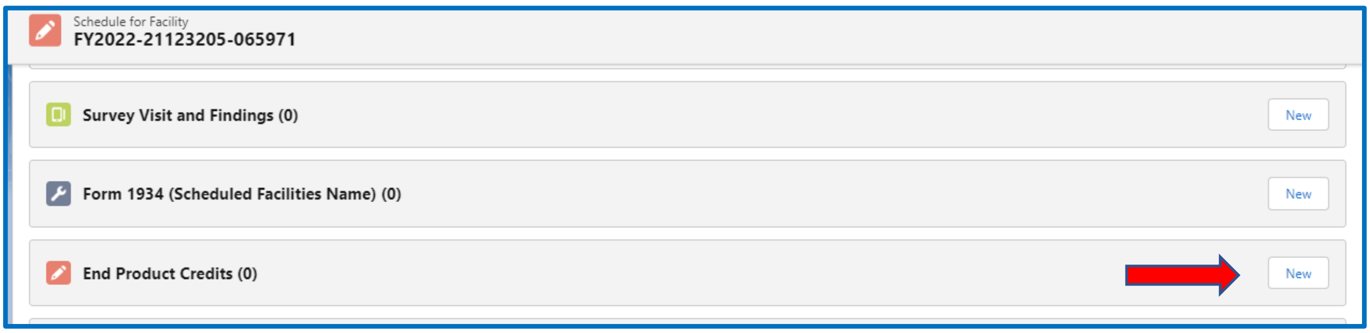
Click the **Send** button to send the email.



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.

Add a New End Product Credit Record

Locate the **End Product Credit** section on your assigned **Schedule for Facility** record, **Survey Input** tab. Find the **End Product Credits** related list and click **New**. **Note**: Once End Product Credit is completed in *E*Force-C&L, the entire survey record will become locked. If revisions are needed, contact your supervisor to request for the record to be temporarily unlocked. When revisions are complete, inform your supervisor to lock the record.



Auto-generation of the EPC Number

All information for **End Product Credit** in E*F*orce-C&L. The system will auto-populate the **EPC #** as illustrated below. **Note:** Once End Product Credit is completed in E*F*orce-C&L, the entire survey record will become locked. If revisions are needed, contact your supervisor to request for the record to be temporarily unlocked. When revisions are complete, inform your supervisor to lock the record.