

RIMS Business Processes and Business Flow Development

RIMS (Reentry Information Management System) is being developed on top of Salesforce customer relations management system. Its purpose is to record the needs of returning citizens (clients) and match them up with service providers who provide those needs to the clients.

Although PowerNet's RIMS system has been in existence for about 9 years, it has been dormant for over 7 years and current requirements are not reflected in the system. In order to bring RIMS up to current standards, we need Rims to:

- Facilitate the entering of clients into the RIMS either manually, through provider websites or Salesforce apps
- Simplify the documenting of the needs of the clients
- Facilitate the entering of services providers either manually, through provider websites or Salesforce connected apps
- Track the services offered by the providers
- Help match services provided with clients' needs
- Track clients as they progress through the RIMS systems
- Create detailed reports on any client or provider

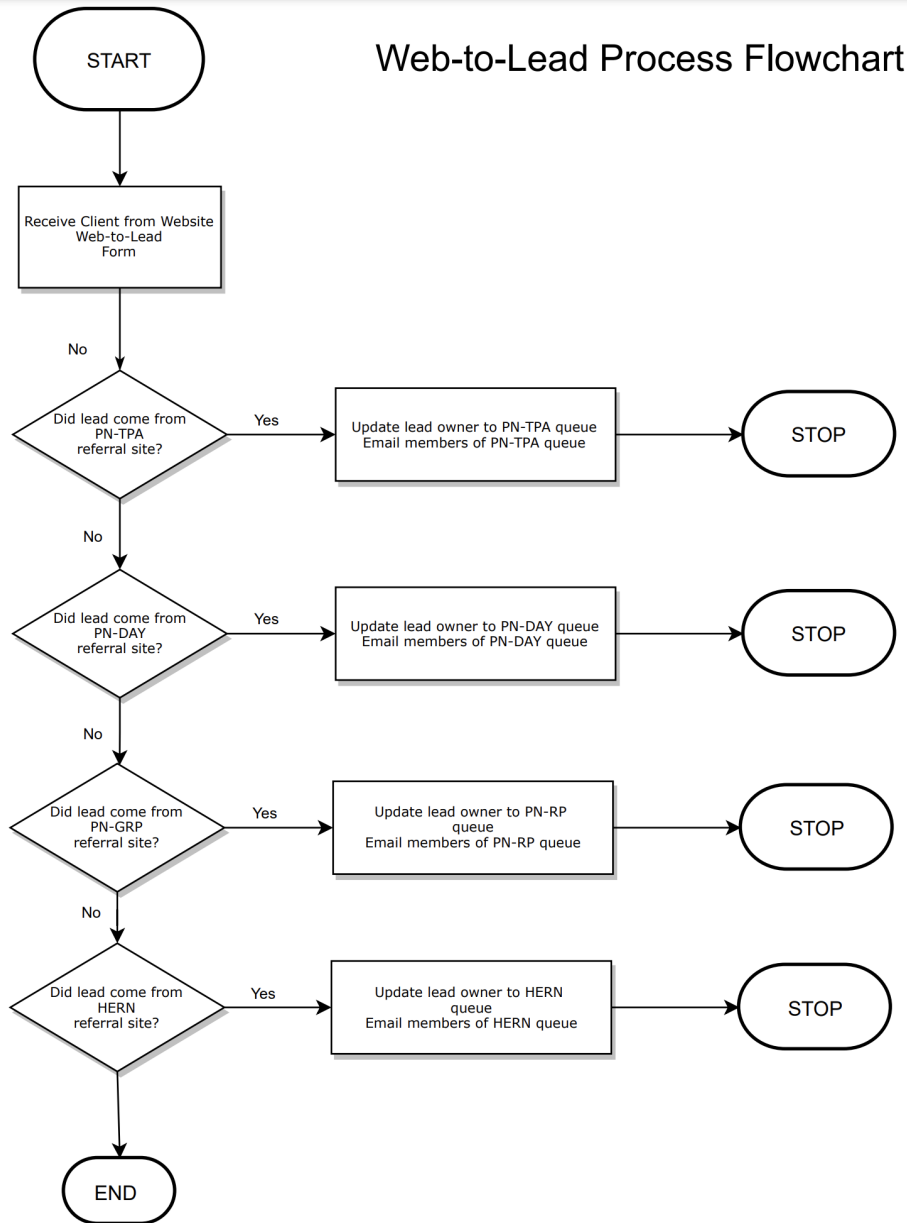
The first step is listing the business processes needed to accomplish the tasks of RIMS and outline those processes with a visual flow chart. Once completed we will know what is needed in RIMS.

However, knowing what we currently have in the RIMS systems is needed as well. We may only need to tweak an existing functionality to accomplish a needed task.

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Following is an example of how flowcharting can help document the RIMS system. This Web-to-Lead process is currently a working component in the RIMS system. From any website with RIMS code added, referrals are sent into the RIMS database as leads ready to be processed into clients while emails are sent to the RIMS staff notifying them of the new referral.

1. State the business Process: Capture Web-to-Lead client, place in appropriate RIMS queue, and email staff of new lead.
2. Create Business Process Flow Chart:



RIMS Overall conceptual view

RIMS (Reentry Information Management System) is being developed on top of Salesforce customer relations management system. Its purpose is to track returning citizens (clients) and their needs and match them up with service providers who provide those needs to the clients.

Entering Clients into RIMS

Clients are entered into the system using multiple input avenues.

- Manually – While logged into RIMS, click Account and create a new account with the ‘client’ account type, and fill in the required information.
- From the Internet – By converting a client lead from a Web-to-Lead form, from an affiliated website.
 - Lead enters S.F. from Web
 - Lead must be accepted by S.F. User to start process within 24 hours. (Notify Org. Admin after 24 hours if lead remains in queue.
- App – From the Salesforce Android app, by clicking ‘New Client Lead’, and fill in the required information.

Processing Clients through RIMS

The following steps are common once a lead has been entered into RIMS

- Check S.F. for new lead after receiving electronic notification
- Contact the lead to verify information received and decision to participate
 - Assist Lead in deciding whether to they want to be a Client or an Ally
 - PowerNet staff explains difference between Client and Ally
 - Provide access to the GEM-LDP application if Client is chosen
 - Send link to email address if they have one
 - Give instructions on how to access application if no email available
 - Document Follow-up Activity on Lead Page in Salesforce
- If Lead is verified as legitimate
 - Convert lead to one of the two record types
 - Client – persons agreeing to enter the program
 - Ally – persons not entering but requesting help from PowerNet
 - Assign to a Salesforce user
 - Assigned a record type
 - PN Case number auto created
 - Arrange to administer assessment to all client leads
 - Administer and Record Client Assessment results
 - Arrange for interested Clients to complete optional GEM LDP Application
 - (can we assign one referral to multiple accounts)

Assessing Clients

Clients are evaluated by means of assessments. Assessments are given to the client in person, and answers recorded manually on paper or directly into the RIMS database. Assessments will paint a picture

of the exact needs of the clients and based on their geographical location and other factors, will allow RIMS to connect **the client to the best accessible service provider to meet the client's prioritized needs.**

Entering Service Providers

Service Providers are entered into the system using multiple input avenues.

- Manually – While logged into RIMS, click Account and create a new service provider account with the 'service provider' account type, and fill in the required information.
- From the Internet – By converting a service provider lead from a Web-to-Lead form, from an affiliated website.
- App – From the Salesforce Android app, by clicking 'New Service Provider Lead', and fill in the required information.

Vetting Service Providers

Service Providers are vetted by means of background checks, submission of required documents to have on file and possibly other means of verification. Once a service provider is vetted, their information is recorded into the RIMS database. Vetting of service providers will paint a picture of the exact **resource** and/or services they provide within the **client's** desired geographical location.