### FINANCIAL COUNSELING (FC) (from FOC Case Record)

**First Session**
- Record Assessments:
  - Financial Health
  - Credit Report
  - Budget
  - Balance Sheet
- Create an Action Plan
- Record Service Entry(ies): Financial Counseling

**Subsequent Sessions**
- Clone and record Assessments to record updates:
  - Financial Health (at least every 6 months)
  - Credit Report (at least every 6 months)
  - Budget
  - Balance Sheet
- Update Action Plan
- Record Service Entry(ies): Financial Counseling

**Unsuccessful Contacts**
- Record Service Entry: Financial Counseling

### EMPLOYMENT COUNSELING (EC) (from FOC Case Record)

**First/Subsequent Sessions**
- Record Service Entry(ies): Employment Counseling and/or Work/Education Supports
- Search for and/or add Entities, as applicable
- Add Employment Record(s), Education/Training Program Record(s), and/or Degree/Certificate/License Record(s) as applicable
- Record progress on an Education/Training Program Record, as applicable
- Record Advancement (to verify retention and/or record job changes) on an Employment Record, as applicable
- Exit Employment Record and/or Education/Training Program Record, as applicable
- Make sure a new Budget Assessment is entered, as applicable

**Unsuccessful Contacts**
- Record Service Entry: Employment Counseling

### INCOME SUPPORTS COUNSELING (ISC) (from FOC Case Record)

**First Session**
- Record Service Entry(ies): Income Supports Counseling, including General Benefits Screening Results and Eligible Benefits fields

**Subsequent Sessions**
- Record Service Entry(ies): Income Supports Counseling
- Make sure a new Budget and/or Balance Sheet Assessment is entered, as applicable

**Unsuccessful Contacts**
- Record Service Entry: Income Supports Counseling