Financial Opportunity Centers

LISC

New FOC Client Data Entry Checklist

Intake

- ☐ Search for the participant and household members
- ☐ If participant not found, add a new participant via the Intake tab
- ☐ Enter demographics
- ☐ Add household members, if applicable
- ☐ Submit Intake and add Case Record details (Fill in BCO checkbox and start date, if applicable)
- ☐ Add Test Assessment(s), if applicable
- ☐ Search for/add Entities for current education and employment records, if applicable
- ☐ Add an Employment Record, if applicable (be sure to select "Client had this job before enrollment" box)
- ☐ Add an Education/Training Program Record, if applicable (be sure to select "Client began this edu. program pre-FOC" box)

Financial Services

- ☐ Record the Financial Health Assessment
- ☐ Record the Credit Report Assessment
- ☐ Record the Budget Assessment
- ☐ Record the Balance Sheet Assessment
- ☐ Create an Action Plan
- ☐ Record a *Financial Counseling* Service Entry

Income Supports Services

- ☐ Record an *Income Supports Counseling* Service Entry, including the General Benefits Screening section

Employment Services

- ☐ Record an *Employment Counseling* Service Entry
- ☐ Search for/add Entities for Education/Employment Records, if applicable
- ☐ Add an Education/Training Program Record, if applicable
- ☐ Add a Degree/Certificate/License Record, if applicable
- ☐ Add an Employment Record, if applicable
- ☐ Record Work/Education Supports via the Service Entry, if applicable
- ☐ Add Test Assessment(s), if applicable