Financial Opportunity Centers

Subsequent Session Data Entry Checklist

Intake

- ☐ Search for the participant
- ☐ Review Contact and Case Record and verify information is up to date

Financial Services

- ☐ Take a new Financial Health Assessment to record changes by **CLONING** the most recent assessment, if applicable (at least every 6 months)
- ☐ Take a new Credit Report Assessment to record changes by **CLONING** the most recent assessment, if applicable (at least every 6 months)
- ☐ Take a new Budget Assessment to record changes by **CLONING** the most recent assessment, if applicable
- ☐ Take a new Balance Sheet Assessment to record changes by **CLONING** the most recent assessment, if applicable
- ☐ Update the Action Plan's ECM Goals, if applicable
- ☐ Record a new *Financial Counseling* Service Entry

Income Supports Services

- ☐ Record a new *Income Supports Counseling* Service Entry
- ☐ Take a new Budget Assessment to record changes by **CLONING** the most recent assessment, if applicable
- ☐ Take a new Balance Sheet Assessment to record changes by **CLONING** the most recent assessment, if applicable

Employment Services

- ☐ Record a new *Employment Counseling* Service Entry
- ☐ Search for/add Entities for Education and Employment records, if applicable
- ☐ Add/update an Education/Training Program Record, if applicable
- ☐ Record Progress on an Education/Training Program Record, if applicable
- ☐ Add/update a Degree/Certificate/License Record, if applicable
- ☐ Add/update an Employment Record, if applicable
- ☐ Record an Advancement (any change or retention verification) on an Employment Record, if applicable
- ☐ Take a new Budget assessment to record changes by **CLONING** the most recent assessment, if applicable
- ☐ Record Work/Education Supports via the Service Entry, if applicable
- ☐ Add Test Assessment(s), if applicable