



FOUNDATION COMMUNITIES
PROSPER CENTERS

Financial Coaching ETO Guide

June 2022

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WORDS TO KNOW



ETO stands for “Efforts to Outcomes.” ETO is a platform used by nonprofits to manage data, share information, and track progress in a secure environment.



A **participant** is a member of our target population or a recipient of service. In Financial Coaching, the participants are your clients.



Demographics are Census-like questions such as race, gender, and ZIP code that are captured for participants. These characteristics are not expected to change as a result of service.

You can find participant demographics on the first page of the Financial Coaching Intake form.



A **TouchPoint** is a data collection tool that captures all details of any direct and/or indirect interaction, activity, etc.

TouchPoints in this program are used to capture supplemental intake information, participant goals, session notes, and emergency and utility assistance applications.

INTRODUCTION TO THIS DOCUMENT

The purpose of this ETO Guide is to **supplement virtual or in-person ETO training** for Financial Coaching volunteers and **provide reference information** after the training(s) take place.

Volunteers will learn how to use ETO as an **effective case management tool** by storing important participant data, recording session notes, setting and working toward goals, and monitoring participant progress.

LOGGING INTO ETO

You can access ETO from your computer using the following URL:

<https://secure.etosoftware.com/home>

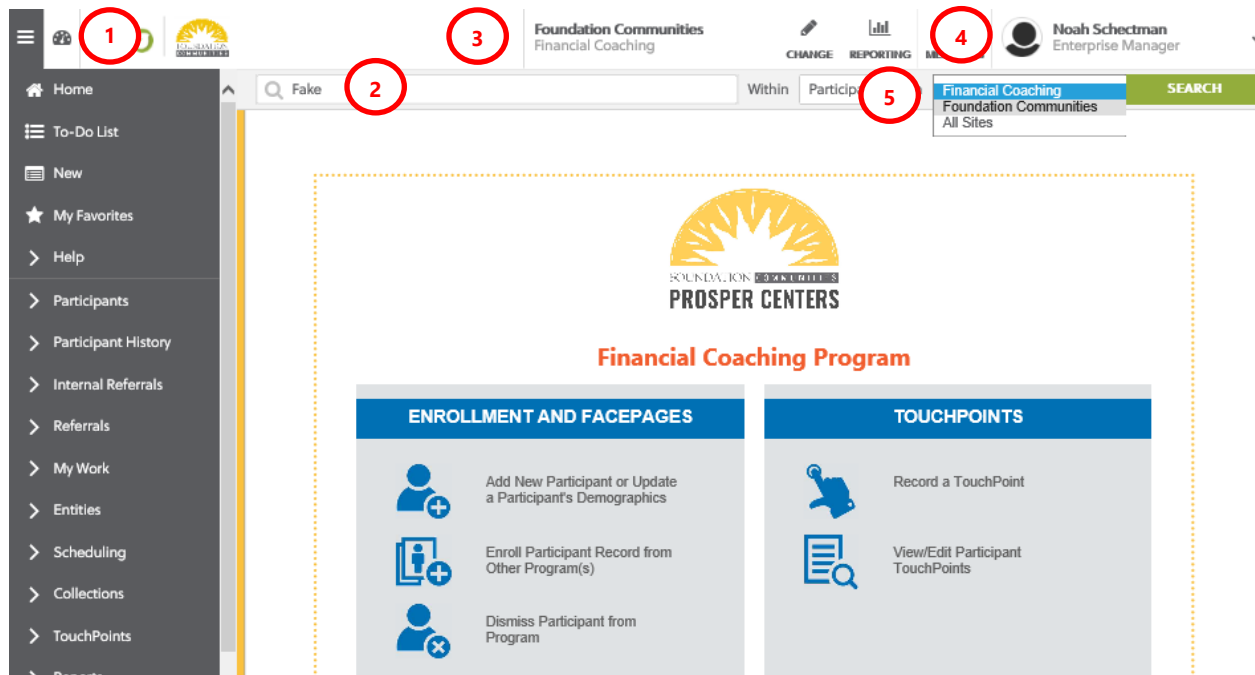
There are six accounts that you can use to log in. It is important to note that **only one person can be logged into one account at a time**. Therefore, you should only log into an account for the time allotted and account indicated in DaySmart, and you should log out as soon as you are finished.

Passwords will be changed periodically for security purposes, and all coaches will be notified when such changes occur.



Important: Please do not share user information with anyone outside of the program, and do not attempt to change an account's password or user settings.

THE ETO HOMEPAGE



- 1. Dashboard Icon:** From any other page, pressing this icon will get you back to the homepage.
- 2. Quick-Search:** This search bar allows you to find participants by first or last name.
- 3. Current Program/Change Programs:** This shows you which program you're currently in. This should always be Financial Coaching.
- 4. Account Information:** This is where your ETO account name is shown; it will be Financial Coach 1, 2, 3, 4, 5 or 6.
- 5. Search Scope:** This drop-down list allows you to widen or refine your participant search. You can search for participants in the Financial Coaching program only, or for participants in the entire Foundation Communities site.

ADDING A PARTICIPANT TO FINANCIAL COACHING

When you start working with a “new” participant, follow the steps below to set-up their record in ETO for further tracking. The process for adding a participant should take around 15 minutes, and **you only need to complete these steps once during your first session**. These preliminary steps will create their record and allow you to enter information about the services you provide and outcomes the program achieves.

Step 1: Check if the participant already has an ETO Record

Just because a participant is **new to you**, that **doesn't mean they are new to Foundation Communities**. **Always start** by checking if a participant is already in the system with the search bar at the top of the screen. Enter their first or last name, set the rightmost drop-down menu to Foundation Communities, and press Search.

Some names are more common than others; if you find an existing participant with the same name as your “new” participant, look for their **date of birth**. If the first name, last name, and date of birth all match, **you don't need to create a new participant**.

If you're unsure about whether your “new” participant already exists in ETO, **use your best judgment**. Do they have a common name? Did they disclose that they are a Foundation Communities resident? You may ask the participant if they have ever participated in another FC program, such as a health and fitness class or adult education.

Foundation Communities
Financial Coaching

CHANGE REPORTING MESSAGES Noah Schectman Enterprise Manager

Q Fake Within Participant In Financial Coaching Foundation Communities All Sites SEARCH

Quick Search Results

Matches for: Fake
Total Participants: 199

Filtered by
First Name

Participant Name	CaseNumber	DOB	Gender	SiteEnrollment
booll, Fake	21250			Currently en
Fake, Fake	27116	12/19/1989	Female	Currently en
Fake, Fake 1	27727	1/1/2000		Currently en
Fake, Fake 10	27736	1/10/2000		Currently en

Make sure you expand the search to **Foundation Communities**, otherwise you will only search your own program.

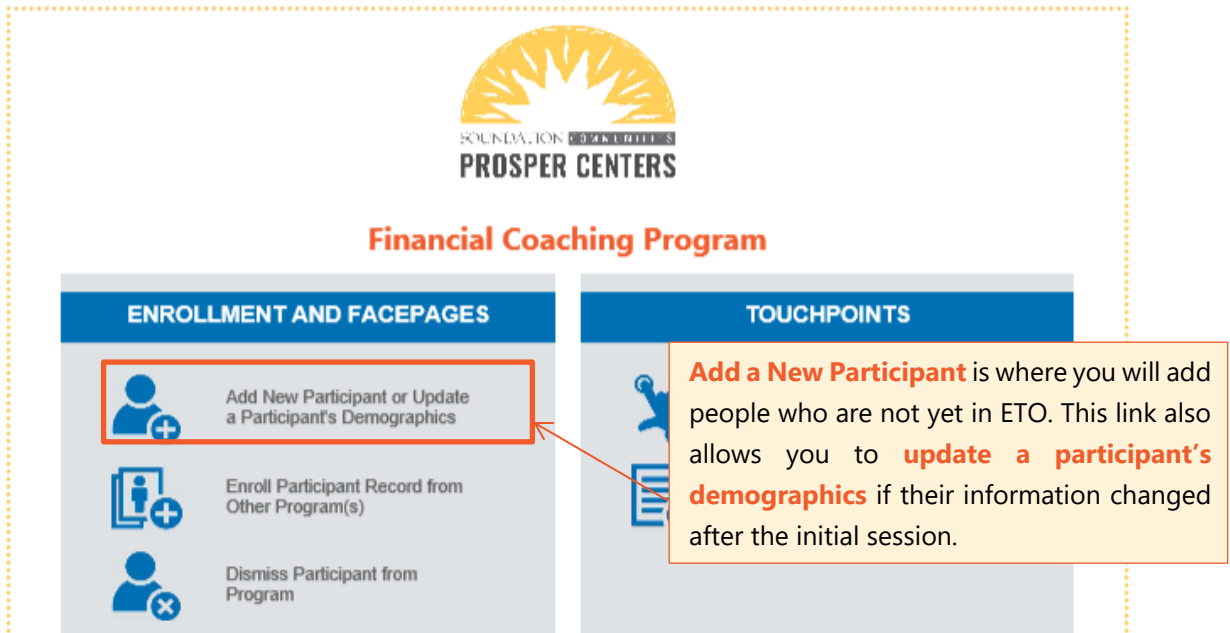
Use the **date of birth column** to confirm the identity of an existing participant.

If you find the person you're looking for, you can **proceed to step 2b** to enroll them into your program.

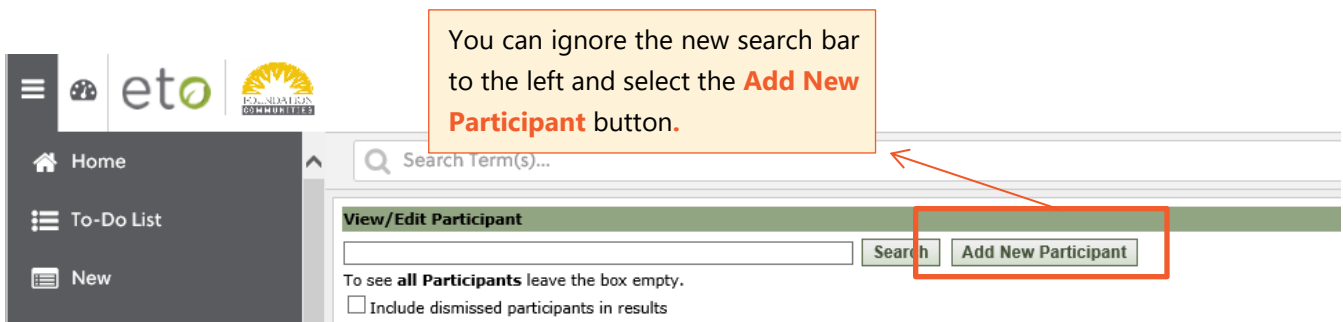
Use the **date of birth column** to confirm the identity of an existing participant.

Step 2a: Adding a new participant record

If you do **not** find a participants' record already in the ETO system, you need to add a record for that participant using the [Add New Participant or Update Participant's Demographics](#) link on your homepage. **Select the Dashboard Icon** at the top of the page to return to this screen.



After clicking this icon, you will be redirected to a page with a search bar and Add New Participant button. **You do not need to search again**; click the [Add New Participant](#) button to begin entering demographic information.



A Note on Search Bars

The difference between the search bar on the Add New Participant page and the main search bar at the top of the screen is that the former will **only search for participants in the Financial Coaching program**; therefore, the main search bar will provide a more comprehensive search.

Completing the Add New Participant Page

The Add New Participant page is where you enter the participant's demographics.

The participant can refuse to answer demographic questions. However, it is important that you obtain three demographics: **first name, last name, and date of birth**. You should not leave the page or save the participant record without completing these three fields. This will help other users identify duplicate participants, which will allow our staff to use ETO as easily and efficiently as possible.



Important: The Financial Coaching intake form asks for birth date in the MM/DD/YYYY format. Before entering this date in ETO, double-check that the participant followed this format, as many countries outside of the U.S. write it differently.

Go through each demographic question on the page with the participant. **You may skip the following demographics: Case number, and Outcome Tracker ID.**

There are special instructions for completing the **Race/Ethnicity** and **Gender** demographics. For each of these demographics, there are two question fields: a drop-down menu and a free text box. The drop-down menu contains a list of identities that are hard-coded into ETO and cannot be changed. If the participant identifies as a race or gender that is not included in the drop-down menus, select **Other**, then use the fields **Other Race/Ethnicity** or **Other Gender**. For example, if the participant identifies as American Indian, you would type "American Indian" in the field titled "Other Race/Ethnicity."

Race/Ethnicity 

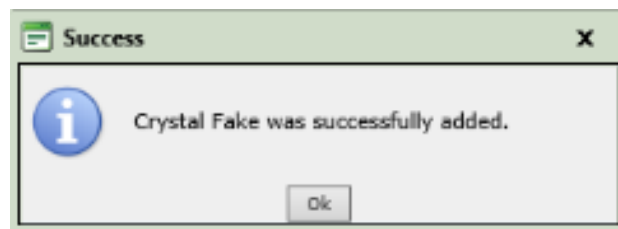
Other 

Other Race/Ethnicity 

American Indian 

At the bottom of the page, you will see the demographic **Assigned Financial Coach**. Find your name in the drop-down menu. If you cannot find your name, contact Erika Leos at erika.leos@foundcom.org to have your name added.

Once you have entered all available demographics, press the green **Save button** at the bottom of the screen. A new window will pop up letting you know that the participant was added successfully. Selecting OK will redirect you to the [Supplemental Intake TouchPoint](#), where you will complete the rest of the intake process.



Step 2b: Enrolling a participant from another program

If you find your participant's record in ETO, enroll them into the Financial Coaching program using the [Enroll Participant Record from Other Program\(s\)](#) link on your homepage. **Select the Dashboard Icon** at the top of the page to return to this screen.

Financial Coaching Program

ENROLLMENT AND FACEPAGES

- Add New Participant or Update a Participant's Demographics
- Enroll Participant Record from Other Program(s)**
- Dismiss Participant from Program

TOUCHPOINTS

- Record a TouchPoint

Enrolling a Participant will allow you to add an existing participant record into the Financial Coaching program. This participant could be enrolled in another program, or they could have participated in Financial Coaching in the past before being dismissed from the program.

The next page will prompt you to search for the participant. Enter their first or last name and press Search. Check the box to the left of their name and press [Enroll Participant](#).

Search Term(s)...

Enroll Participants into Financial Coaching

Search for Participants in Foundation Communities by last name and/or first name, Social Security Number, case number, or family name. To see all 1. Enter search criteria. 2. Select participant(s) to enroll. 3. Enter enrollment information; if multiple participants are selected with different dates, fi

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:

Below are all Participants who are not currently enrolled in **Financial Coaching** with last name like 'Fake'.

<input type="checkbox"/>	Participant	Age	Case Number
<input checked="" type="checkbox"/>	Fake Fake		31313
<input type="checkbox"/>	Naomi Fake-Trevino		23624

* **Program Start Date:**

Program Start Date will automatically populate with today's date.

Updating Demographic Information

After enrolling a participant, click the [Dashboard Icon](#) at the top of the screen. Select the [Add New Participant or Update Participant's Demographics](#) link on the homepage to review existing demographic information.

You should use this page to double-check that the participant's demographic information is up-to-date, as well as complete program-specific demographics like **Assigned Financial Coach**. Guide the participant through all of the demographics. Just like when we were adding a completely new participant, you do not have to complete the **Case Number** or **Outcome Tracker ID** fields. However, if these demographics are already filled in, leave them as-is.

The screenshot shows the 'Edit Participant' form for a participant named Jojo Fake. The form includes fields for First Name, Middle Name, Last Name, DOB, Home Phone, Cell Phone, Email, Address 1, Address 2, and Zip Code. A callout box highlights the Cell Phone, Address 1, and Address 2 fields, stating: 'Certain demographic data such as cell phone number or address can change often, so be sure to check that an existing participant's information is up-to-date.' The form also has buttons for 'Audit Report', 'Program History', 'Enroll', and 'View Jojo Fake's Dashboard'. The status is 'Currently Enrolled'.

Select the Save button at the bottom of the screen. A pop-up box will be triggered to let you know that the participant has been updated.



Step 3: Completing the Supplemental Intake TouchPoint

After completing the Add New Participant page, **you will be redirected to the Supplemental Intake TouchPoint**. If you were not redirected, or **if you just enrolled an existing participant**, select the [Dashboard Icon](#) at the top of the screen to return to the homepage.

The next step of the intake process is completing the Supplemental Intake TouchPoint. If you are not redirected to this TouchPoint, navigate to the homepage and select **Record a TouchPoint**.

The Record a TouchPoint page will prompt you to select a TouchPoint and a participant. Select Financial Coaching Supplemental Intake from the drop-down menu.

Select TouchPoint:

- Select a TouchPoint -
- Emergency Assistance Application
- File Share with Consultant
- Financial Coaching Participant Goal
- Financial Coaching Retention Contact
- Financial Coaching Session
- Financial Coaching Supplemental Intake
- Rent Reporting Enrollment
- Utility Assistance Application

You will then be prompted to select a participant. Enter their first or last name in the search bar and press the Filter button. Select a name by checking the box to the left and pressing the Continue button at the top or bottom of the page.

Participants

Include Dismissed Participants

Page size: 50 Page 1 of 1, rows 1 to 5 of 5

	Name
	<input type="text" value="Fake"/>
1 <input checked="" type="checkbox"/>	Fake, Crystal

Filling out Supplemental Intake Information

This TouchPoint is where you will fill out fields specific to Financial Coaching, including income, savings, and debt.

Guide the participant through all questions, just as you did with the demographics page. Again, the participant may refuse to answer any questions. However, the more questions a participant answers, the better you will be able to help them achieve their financial goals.

Completing the Supplemental Intake also allows us to track the financial status of our participants. By gathering a complete financial snapshot of an individual at the beginning of their coaching journey, we can report these metrics to existing and potential funders.

The information in the Supplemental Intake is required on reports to our funder, the Texas Financial Education Endowment (TFEE). We cannot report participants who do not complete at least part of Supplemental Intake.

You may notice that this TouchPoint has two tabs: **Financial Snapshot** and **TFEE Post-Survey**.

Financial Coaching Supplemental Intake for Fake, Jojo on 5/27/2020

Financial Snapshot TFEE Post-Survey

Number of people in household:

Total monthly household income: \$

During the intake portion of the coaching session, **only complete the Financial Snapshot tab**. You will help the participant complete the TFEE Post-Survey at the end of the session.

Once you have answered all of the questions in the first tab, save the TouchPoint.

I would be able to deal with a financial emergency that cost ~\$750. No Sometimes Yes

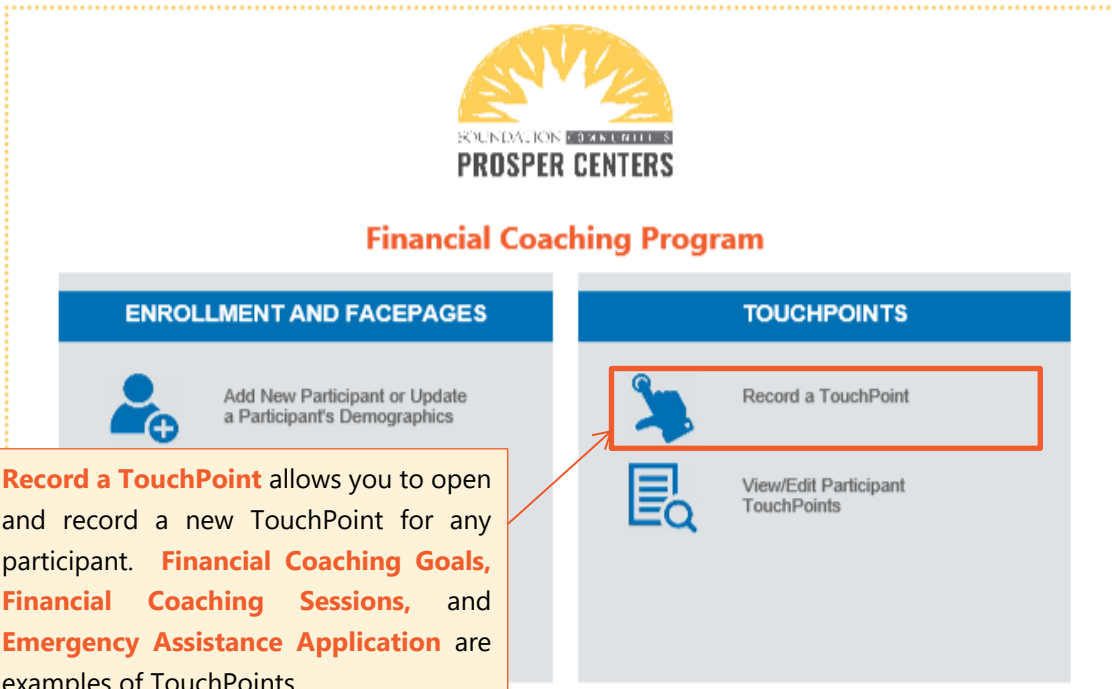
Selecting **Save** will trigger a pop-up box to let you know that the TouchPoint has been saved. You will then be redirected to the **Record TouchPoint** page.

DOCUMENTING FINANCIAL COACHING SERVICES

During a participant's **first session**, you must complete:

- **At least one *Financial Coaching Participant Goal*** TouchPoint
This is where you formally record the participant's goal(s).
- ***Financial Coaching Session*** TouchPoint
This is where the notes & general information about the session go
- ***TFEE Post-Survey*** from the Supplemental Intake TouchPoint
The participant will answer two final questions and leave additional comments

After completing the intake process, you should move on to the [Financial Coaching Participant Goal TouchPoint](#). Select the [Dashboard button](#) at the top of the screen to return to the homepage, and select the [Record a TouchPoint](#) link.



The screenshot displays the 'Financial Coaching Program' dashboard. At the top center is the logo for 'FOUNDATION COMMUNITIES PROSPER CENTERS'. Below the logo, the title 'Financial Coaching Program' is centered. The dashboard is divided into two main sections: 'ENROLLMENT AND FACEPAGES' on the left and 'TOUCHPOINTS' on the right. The 'ENROLLMENT AND FACEPAGES' section contains a button with a person icon and a plus sign, labeled 'Add New Participant or Update a Participant's Demographics'. The 'TOUCHPOINTS' section contains two buttons: 'Record a TouchPoint' (highlighted with a red box and an arrow) and 'View/Edit Participant TouchPoints'. A callout box on the left explains the 'Record a TouchPoint' function.

Record a TouchPoint allows you to open and record a new TouchPoint for any participant. **Financial Coaching Goals, Financial Coaching Sessions,** and **Emergency Assistance Application** are examples of TouchPoints.

Choose the appropriate TouchPoint from the drop-down menu on the next page, select your participant's name, and press the Continue button. **See Page 10** for a review of how to select a TouchPoint.

Step 4: Tracking a participant goal

During the initial coaching session, you should record at least one participant goal using the [Financial Coaching Participant Goal TouchPoint](#).

The screenshot shows a web form for setting a goal. At the top, there is a field labeled "Identifier: *" with a red box around it and a red arrow pointing to a callout box. Below this is a tabbed interface with the "Goal Setting Information" tab selected. Under the tab, the heading "Goal Setting Information" is displayed in orange. Below the heading is the "Goal Type:" field, also marked with a red asterisk and a red box, with a red arrow pointing to a callout box. The dropdown menu shows "-- Select --". Below the dropdown is a large text area labeled "What is your goal?".

Identifier: *

Goal Setting Information

Goal Setting Information

Goal Type: *
-- Select --

What is your goal?

Think of the **Identifier** as a title or subject line for the goal. When creating an identifier, be sure to number the goal and briefly summarize it. Some examples of identifiers include **Goal 1: Raise credit score**, **Goal 2: Save for a house**, or **Goal 3: Pay off student loans**.

Goal Type is a required field. The six goal types are **Debt reduction**, **Improve credit**, **Create and follow budget**, **Increase savings**, and **Stabilization**. Based on the goal type you choose, new goal-specific fields will appear.

Recording Action Steps

On the [Participant Goal TouchPoint](#), you can identify up to ten action steps that the participant may take to complete their goal. Every time one of these steps is completed, return to this TouchPoint and update the **Date Completed** field that corresponds to the action step completed. They do not have to be completed in the order that they appear.

Recording each individual step toward a goal and the date it was completed is important for tracking a participant's progress. It is up to you and the participant to set expectations for completing these steps and to decide when a goal can be considered accomplished.

The screenshot displays a form for recording action steps for a goal. It features three rows of input fields for action steps and their completion dates. The first row is highlighted with a red box. A callout box points to the first row, explaining the 50-character limit for action steps and the requirement to enter future dates. Another callout box points to the 'Goal Status' dropdown, which is also highlighted with a red box, explaining the 'Active - in progress' status.

Action step #:	Date completed:
Open a savings account 22/50	mm/dd/yyyy
Save \$200 9/50	
Pay off credit card debt 24/50	mm/dd/yyyy

Status & Completion Information

Goal Status:
Active - in progress

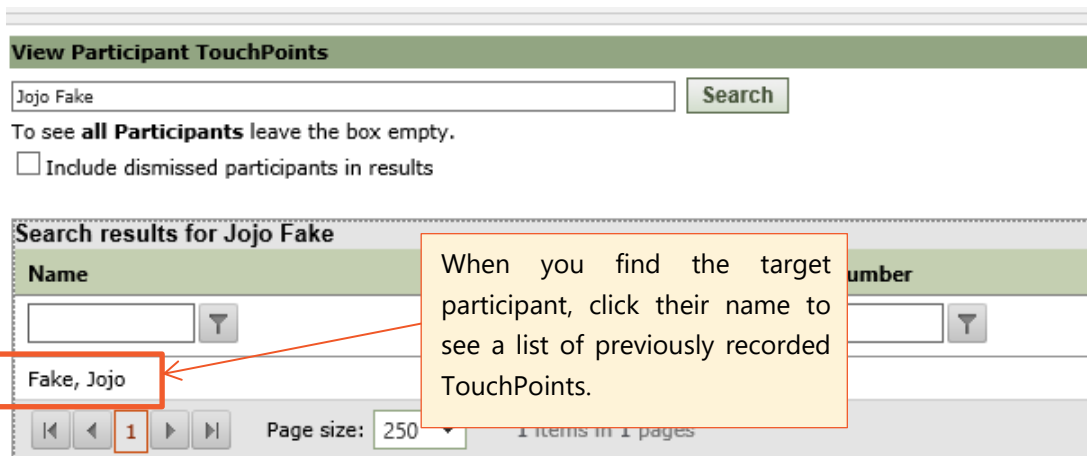
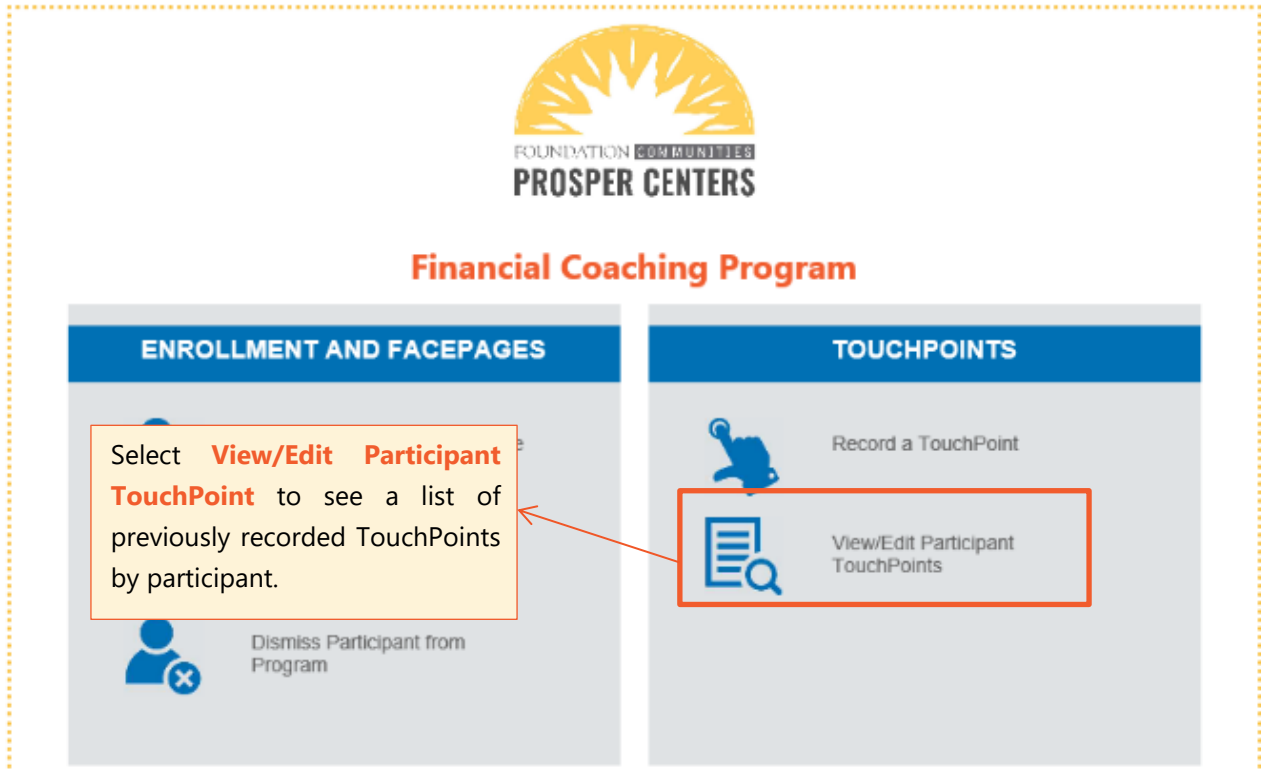
You have 50 characters to describe each action step. Do not fill out the **Date completed** field until after that step is complete; therefore, you should enter future dates.

When adding a new participant goal, the **Goal Status** field to **Active - planning**. This means no action steps have been completed. When an action step is completed, change the goal status to **Active - in progress**. This helps you better understand the participant's current progress.

Step 4a: Updating an existing Goal TouchPoint

Rather than recording a new Goal TouchPoint every session, as you will do with the [Financial Coaching Session TouchPoint](#), you will only record one TouchPoint per goal. As the participant makes progress on the goal or the goal status changes, you will edit and update the existing TouchPoint.


From the dashboard, navigate to [View/Edit Participant TouchPoint](#) and search for the participant by first or last name.




Review TouchPoints

Review TouchPoints for Fake, Jojo

TouchPoint Name



 Financial Coaching Participant Goal [Take New](#)


Press the **[+]** symbol to the left of the TouchPoint name to expand the full list.


From this screen, you are able to view each individual TouchPoint, as well as **Date Completed**, **Date Last Updated**, and **Identifier**.




Review TouchPoints

Review TouchPoints for Fake, Jojo

TouchPoint Name



 Financial Coaching Participant Goal [Take New](#)

Date Completed 	Last Updated 	Identifier 	
3/26/2020	3/26/2020	Goal 3: Create budget	
3/26/2020	3/26/2020	Goal 2: Raise credit score	
3/26/2020	3/26/2020	Goal 1: Save for college	

The rightmost column of this table is titled **Take Action** and allows you to **View**, **Edit**, or **Delete** a TouchPoint. These options correspond with the **Eye**, **Pencil**, and **Trash** icons. Select the [Pencil Icon](#) in the middle to edit an existing goal TouchPoint.



Important: Even if a goal has been completed or postponed, you should not delete its corresponding TouchPoint. Saving old TouchPoints is important for your records. Instead, change the goal status and change the Identifier to indicate that the goal is not active. For example, you may change the Identifier to **Goal 1: Save for college (COMPLETED)**.

Step 5: Completing the Post-Survey

After you have discussed the participant's financial situation and identified their goals and next steps, the initial session is almost complete. At the end of every initial session, the participant must answer two short questions. This is called the **Post-Survey**, and it can be found on the [Financial Coaching Supplemental Intake TouchPoint](#).

Return to the homepage by selecting the [Dashboard Icon](#). From here, you will open the [Supplemental Intake TouchPoint](#). **Review Page 14** for directions on updating an existing TouchPoint.

Select the second tab labeled TFEE Post-Survey. Guide the participant through the questions on this tab just like you did with the first tab. Again, they can always refuse to answer these questions – but if they are willing to answer, **it is crucial that you record their responses**. This should not take more than a few minutes.

Financial Snapshot | **TFEE Post-Survey**

With "1" being the least confident and "5" being the most confident, how confident are you in your ability to achieve a financial goal you set for yourself?

1 2 3 4 5

Are you more likely to take any of the following action(s)? Select all that apply.

- Open a bank account
- Open a retirement fund
- Pay off debt
- Check your credit score
- Start saving/open a savings account
- Attend other financial education courses/services
- Budget/track expenses
- Other

Please include any additional comments below:

The Post-Survey is part of a requirement from the **Texas Financial Education Endowment, or TFEE**. This organization funds the financial coaching program through a grant; one of the stipulations of this grant is that Foundation Communities records these Post-Survey questions.

Even if the participant has been previously enrolled in Financial Coaching and was just re-enrolled, they still need to complete the Post-Survey.

Once you have completed the Post-Survey, save the TouchPoint and return to the homepage using the [Dashboard Icon](#).

Step 6: Document session information

After each session, record a [Financial Coaching Session TouchPoint](#). Here you can record what you discussed with the participant and any next steps identified. These notes will be a crucial part of the client's record. Unlike the [Participant Goal TouchPoint](#), you will create a new TouchPoint every time you meet with a participant.

It is best practice to record session notes after your time with the participant is finished. Remember that your session should last about an hour; the remaining 30 minutes of your DaySmart time slot can be used to finish data entry, including this TouchPoint.

The screenshot shows a web form for recording session information. It includes an Identifier field with a dropdown menu showing 'Created budget'. Below this is a 'First Page' tab and a 'Financial Coach' dropdown menu. The 'Time Spent' field is a text input followed by 'Minutes'. The 'Financial Programs Service Location' field has a dropdown menu showing 'Phone/Virtual'. The 'What did you work on today?' section contains a list of checkboxes: Debt reduction, Improve credit, Create and follow budget, Increase savings, Stabilization, Emergency resources (checked), and Other. At the bottom, there are three input fields for 'Credit Score', 'Total Debt', and 'Total Savings', each with a dollar sign. A red note above these fields states: 'Credit score, total debt, and total savings are populated from the previous TouchPoint response. Please update these fields if they have changed, or delete them if they have not changed.'

Choose an **Identifier** that summarizes the theme(s) for this session. This and the TouchPoint date will help you quickly identify a specific session if the participant has had many sessions, or if they met with a different coach in the past.

If the session took place virtually or over the phone, you will be able to record this as a **location**.

You can select multiple choices for this field; the choices correspond to goal types from the **Goals TouchPoint**. If you filled out an **Emergency or Utility Assistance** application, or if you went over resources related to COVID-19 or some other financial emergency, select **Emergency resources**.

If the participant provides a **current credit score** or **debt amount**, record them here. This allows us to track the changes in each amount over time.

Credit score, total debt, and total savings are populated from the previous TouchPoint response. Please update these fields if they have changed, or delete them if they have not changed.

Credit Score:

Total Debt: \$

Total Savings: \$

Recording Session Notes

Record your notes in the text box at the bottom of the page. You should provide as many important details as possible, but avoid wordiness or unnecessary information. **Only record notes that are relevant to Financial Coaching.**

Use this field to record any progress made on goals, changes to the participant's employment, income, or housing, and any next steps identified. You can also use this space to record any concerns that you or the participant have.



Important: Take notes as if an outside third party will have to read them. What information would they need to know in order to serve the participant? Another coach may very well have to read your notes if you are sick or if a scheduling conflict arises, so **avoid abbreviations and vague wording.**

Notes:

```
Participant shared that his hours at work were cut and he is losing ~$200 of monthly income, so we had to readjust his plan for reducing debt. We discussed changing the payment plan on his student loans, which he will do before our next session. Participant also shared that his credit score increased from 520 to 550 after paying off a debt to collections.
```

358/5500

Possible Client Story? Yes

Possible Client Stories

Check the box labeled **Possible Client Story?** if you believe a participant has a compelling story that should be brought to the attention of Foundation Communities staff. Examples of this include overcoming an extreme hardship or making outstanding progress toward a goal.

Possible client stories are compiled into a report, which FC staff will review at a later date. Staff will be fully responsible for reaching out to clients to get authorization, interview them, and write up their story – coaches are only responsible for **identifying these stories.**

When approaching this subject, consider the talking points:

Many people do not know about our program, so we do a lot of outreach to the community. We think other community members would be inspired by your story and it could help us get the word out to other people who might be interested. Would you be okay with us sharing your story? Saying yes today does not commit you to anything, but a Foundation Communities staff member may reach out to talk about it further.

TouchPoint Best Practice

During your initial session, you will be working with several TouchPoints as well as the participant demographics page. You might find it easier to keep two or more tabs open in your browser to minimize the amount of times you switch between pages.

Choose a method that works for you: you can keep the [Supplemental Intake TouchPoint](#) in a separate tab, so that you can return to the same TouchPoint to complete the Post-Survey. You can keep the [Supplemental Intake, Participant Goal](#), and [Session Notes TouchPoints](#) in three separate tabs. Or, if you are comfortable using the homepage to switch between TouchPoints, you can keep just one tab open.

Consider keeping a notebook nearby to jot down brief notes about your session. This will help you remember all the topics discussed and make it easier to fill out the [Session Notes TouchPoint](#) at the end of the session.

Remember that every session after the initial one will require much less data entry – you will only need to complete the [Session Notes TouchPoint](#) and possibly update the [Participant Goals TouchPoint\(s\)](#).

Reviewing previous Session Notes

If you want to review session notes from a previous section, follow the same steps from [Step 3a: Updating an existing Goal TouchPoint](#). Instead of expanding the list of Participant Goal TouchPoints, you will expand the list of Session TouchPoints.

Review TouchPoints

Review TouchPoints for Fake, Jojo

TouchPoint Name

Financial Coaching Participant Goal **Take New**

Financial Coaching Session **Take New**

Date Completed	Last Updated	Identifier
<input type="text"/>	<input type="text"/>	<input type="text"/>
3/27/2020	3/27/2020	Changed Payment Plan

Select the [Eye Icon](#) to the right of the TouchPoint information to view that session's notes.



You can filter TouchPoints by date completed, date last updated, or Identifier. For example, if you are looking for a session that you know took place on March 27, enter the date in the blank box, click the [Filter Icon](#), and select [Equal To](#).

If you want to identify all sessions where debt was a central topic, try typing **Debt** into the text box below **Identifier** and follow the same steps (*this will only work if you accurately title your Identifiers*).

Financial Coaching Session **Take New**

Date Completed	Last Updated
<input type="text"/>	<input type="text"/>
3/27/2020	3/27/2020

Take New TouchPoint

NoFilter
EqualTo
NotEqualTo

EMERGENCY ASSISTANCE, UTILITY ASSISTANCE, AND COVID-19

You will have some participants who do not need help with a long-term financial goal. For Emergency Coaching sessions, you do not need to complete a Participant Goal Touchpoint. Instead, if the emergency is related to COVID, you can complete a [COVID-19 Impact and Response TouchPoint](#). If the client is a resident of Foundation Communities housing, you can refer them to a Financial Wellness Coordinator to apply for emergency assistance. A Community Support Specialist can help you make the referral, or you can email coachsupport@foundcom.org.

Required Documentation

Residents applying for Emergency or Utility assistance are required to submit documentation that demonstrates their financial need.

- For **Emergency Assistance (rent, water or gas)**, the resident will submit documentation of their income loss or added expenses caused by the emergency.
- For **Utility Assistance (electric only)**, the resident will submit a copy of their most recent Austin Energy bill.

The client will be directed to submit documentation by email or text. If you are able and willing to help the client with the document submission process, you can collect documentation and submit it to assistance@foundcom.org or [512-937-3421](tel:512-937-3421) on their behalf.

Sessions related to COVID-19

If the participant has told you that they are seeking financial coaching as a result of the COVID-19 crisis, you will also need to complete the [COVID-19 Impact and Response TouchPoint](#). This touchpoint is shared between every Foundation Communities program and is used to collect organization-level data for grant reporting. It should only take a few minutes to complete. **See Page 10** for a review of how to select a TouchPoint.

The COVID-19 TouchPoint is separated into three tabs: **Impact, Organization Response,** and **Definitions**.

You do not need to complete every field in this TouchPoint; only answer questions that are relevant to your coaching session.

Recording COVID-19 Impact

The **Impact tab** is used to describe how COVID-19 has affected the participant's income and available resources.

Type of communication:

Case management session ▼

If the participant is expected to return for another session, select **Case management session** as the type of communication. If not, select **One-time session**.

Lost employment due to COVID-19?

- Yes
 No

Clear Selection

Receiving unemployment benefits?

- Yes
 No

Clear Selection

Reduced income due to COVID-19?

- Yes
 No

Clear Selection

Reported need for (check all that apply):

- Rental assistance
- Financial assistance
- Healthcare resources
- Internet/technology
- Education resources
- Food
- Childcare
- PPE/Cleaning supplies
- Medical supplies
- Employment assistance

Record any resources for which the participant reported a need. Some participants may not explicitly report their needs; in this case, leave this section blank.



Important: Only record information that is related to COVID-19. For example, if the participant lost their job for a reason not related to COVID-19, **do not** record loss of employment.

Recording Response to COVID-19

The Organization Response tab is used to notate how you responded to the participant's needs, including referrals to Foundation Communities resources or other community resourced.

SERVICES PROVIDED

Services provided from FC (check all that apply):

- Food pantry
- Financial coaching**
- Tax help
- Insurance enrollment
- Monetary** rental assistance
- Non-monetary** rental assistance
- Case management services
- Financial assistance
- Benefits enrollment
- Employment assistance
- Mental health services
- Education enrollment/scholarship assistance

The only question you need to fill in is **Services Provided**, for which you must select **Financial coaching**. You can also select **Case management services** if the session is part of ongoing coaching services.

If you are confused about any of the terms in this TouchPoint, refer to the **Definitions tab** and find the term in question. If you still do not understand a certain term, contact the Client Support Specialist.

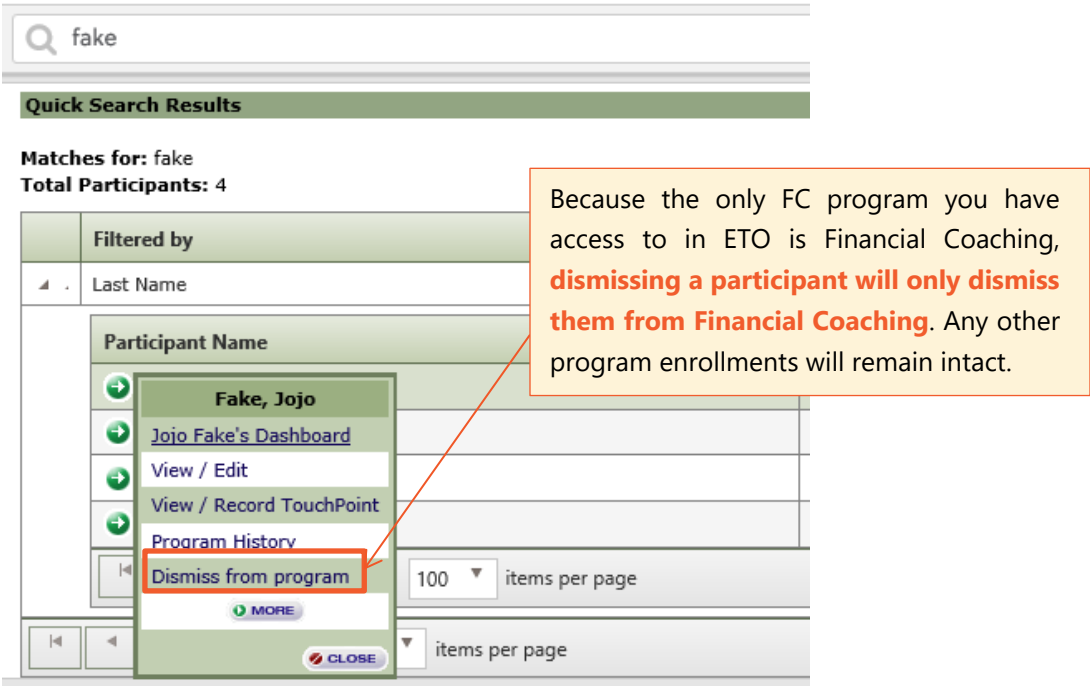
You will complete a [COVID-19 Impact and Response TouchPoint](#) for every session related to COVID-19. So, if a participant returns for multiple coaching sessions where the financial impact of the pandemic is of concern, they will have multiple TouchPoints.

DISMISSING PARTICIPANTS

If you find during a session that the participant has completed all their goals and has no new goals to create, or if the participant verbally expresses that they will not be returning to Financial Coaching, they need to be dismissed from ETO.

Inactive participants should be dismissed promptly. **Dismissing will not delete any information.** Rather, it will help keep the site organized and easy to use. Dismissed participants can always be re-enrolled if they return for more services.

To dismiss a participant, search for their name with the search bar at the top of the page. Select the green arrow to the left of the participant's name, then select **Dismiss from program** on the menu that appears.



You will be prompted to select a dismissal reason. Choose the most appropriate option, and press the **Dismiss Participant** button at the bottom of the screen.

* **Program End Date:**

Dismissal Reason:

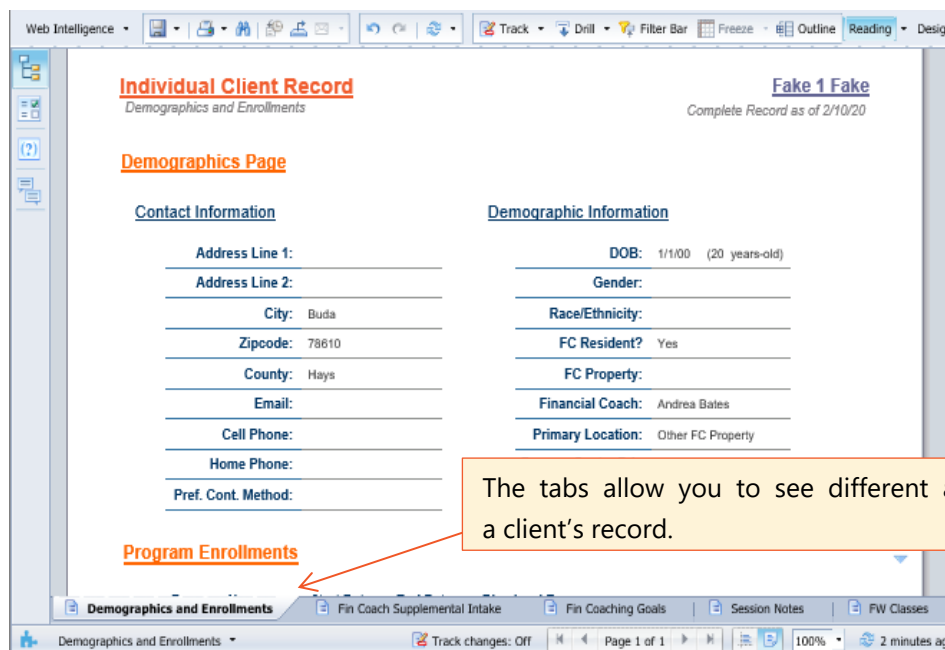
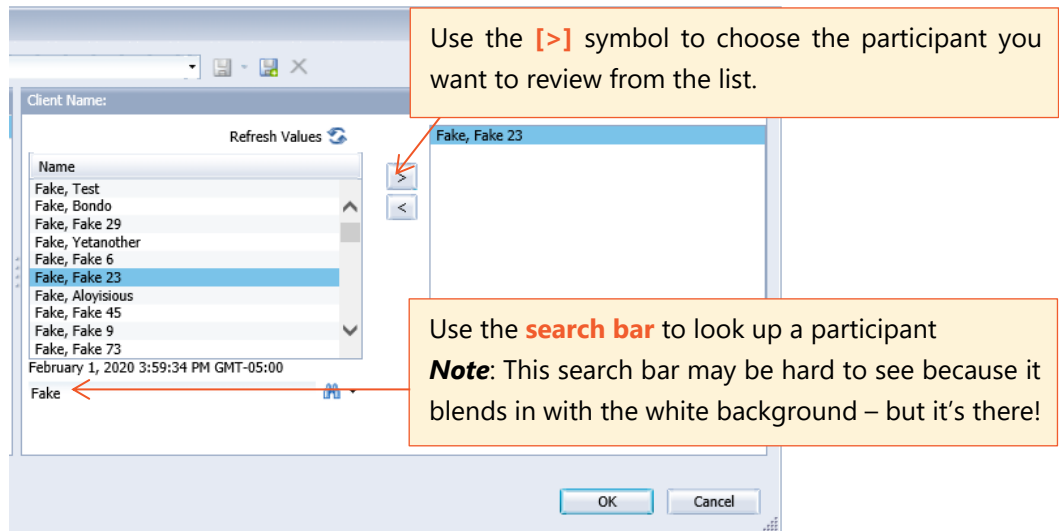
- Other
- Completed program
- No longer in need of services
- Program cannot meet client's needs

MONITORING YOUR WORK IN FINANCIAL COACHING

Reviewing a participant's complete case record

To see every piece of information in a client's record, click on the [Complete Case Summary](#) link on the homepage.

A separate window will appear and ask which client to generate the record for:



Reviewing a participant's dashboard

To see a summary of important information, search for the client's name, then in the results page, click on the participant's name, then the [View Dashboard](#) link.

Quick Search Results

Matches for: fake
Total Participants: 1

FILTERED BY

Last Name

PARTICIPANT NAME	ADDRESS1
Fake, Eliana	49713

Click to see the client's dashboard.

Fake, Eliana

- Eliana Fake's Dashboard
- View / Edit
- View / Record TouchPoint
- Dismiss from program

Close

On the client's dashboard, you will see their contact information, a list of credit score, debt and savings from their Financial Coaching Session Touchpoints, and a list of recent Emergency and Utility Assistance applications, including the status of the application.

Eliana Fake's Dashboard

Participant Information

Eliana Fake

FirstName: Eliana
LastName: Fake
E-Mail:
HomePhone:
CellPhone:
Assigned Financial Coach:
Preferred Language:
[View/Edit Participant](#)

Credit, Debt, and Savings

Take Action	Date Completed	Credit Score	Total Debt	Total Savings
	6/16/2022	560	\$18,000.00	\$0.00

+ New

Recent EA Applications

Take Action	Date Completed	Application Status	Date Approved	COVID Related?
	6/8/2022	Under Review		No

+ New

Recent UA Applications

There are no recent TouchPoints for this participant.

+ New

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CONFIDENTIALITY

You should only be logged in to ETO during the assigned 1½-hour time slot in DaySmart. You can use approximately 30 minutes of this time slot to take notes, finish data entry, and familiarize yourself with the database.

Because you are handling sensitive financial information, it is important that you **do not** access ETO outside of Financial Coaching. This also includes printing copies of a participant's demographics, TouchPoints, or Complete Case Summary. Please refer to the **Confidentiality and Data Safety policy** for more details.

QUESTIONS AND TROUBLESHOOTING

If you are having visibility issues with ETO, such as being unable to view certain pages, you can contact Social Solutions for immediate assistance at [866-732-3560 x 2](tel:866-732-3560). This number is accessible Monday-Friday, 7 am-7 pm Central time.

Direct general inquiries and any other questions about ETO to the Community Support Specialist. If the CSS cannot answer your question, they will reach out to someone who can. While you are coaching remotely, you can reach the CSS at [737-717-4000](tel:737-717-4000). CSSs are on call Monday-Friday during Financial Coaching hours.

If you have a question about procedure or a problem with a specific participant, contact coachsupport@foundcom.org.

If you feel you will need to ask questions or reach out for help during your appointment, please adjust your schedule accordingly. If you choose to schedule appointments on weekends or evenings, understand that you may not have access to all the above resources.