ETO SESSION CHECKLIST

For all initial sessions:

- ◻ Search for participant by name
- ◻ Add new participant record OR enroll existing participant in Financial Coaching
- ◻ Complete demographics on **Add New Participant page** OR update existing demographics
- ◻ Complete **Supplemental Intake TouchPoint**
- ◻ Complete **Post-Survey** questions from the second tab of the **Supplemental Intake TouchPoint**
- ◻ Complete at least one **Participant Goal TouchPoint**
- ◻ Complete **Financial Coaching Session TouchPoint**

For all subsequent sessions:

- ◻ Search for participant by name
- ◻ Review previous TouchPoints (if necessary)
- ◻ Update existing **Participant Goal TouchPoint** and/or add new **Participant Goal TouchPoint**
- ◻ Complete **Financial Coaching Session TouchPoint**

Notes

- ◻ If a new client no-shows, do not create a participant record in ETO. If an existing client no-shows, do not complete a Financial Coaching Session TouchPoint.

For help with…

- ◻ Trouble viewing or accessing ETO: Contact Social Solutions at **866-732-3560 x 2**
- ◻ ETO-related or general inquiries: Contact a Community Support Specialist at **737-717-4000**
- ◻ Trouble with a specific participant: Contact your support team at **coachsupport@foundcom.org**