FINANCIAL COACHING SESSION CHECKLIST

Before the Appointment:

□ Review the email notification

□ If the appointment is by Zoom, schedule the meeting in Zoom & add the details to DaySmart at least 2 days prior to the session

□ If the appointment is by phone or in-person, you do not need to update anything in DaySmart

□ If you cannot make the appointment, contact the volunteer coordinator ASAP

□ If the client seems to be seeking a different service (i.e. College Hub, Tax Help), contact the volunteer coordinator

Preparing to Start the Appointment:

□ Pull up the Volunteer Resource Page & ETO session checklist

□ Have a notebook and pen handy

□ Log into DaySmart to access the client's contact information

□ Be prepared to log into ETO using the assigned account (don't log in until the appointment start time); check DaySmart or the email notification to find the assigned ETO account

□ For phone meetings, be prepared to call at the time of the appointment (if the client doesn't answer, leave a message); try calling or texting again in 5-10 minutes (if client still doesn't connect after 10 minutes, mark the appointment as a no-show in DaySmart)

□ For Zoom meetings, log into Zoom and wait for the client to arrive; if they haven't arrived within 5 minutes, try calling or texting; if they don't arrive within 10 minutes, mark the appointment as a no-show

□ For in-person meetings, the computers in the coaching offices at the Prosper Centers have the Volunteer Resource Page, ETO and DaySmart bookmarked

During the Appointment:

□ Use the ETO session checklist to ensure you capture all necessary info and touchpoints

□ If meeting by Zoom, share links and documents through the chat feature

□ Schedule a follow-up session before ending the meeting

□ If you need immediate support, contact the main Prosper Center line to speak with a Community Support Specialist: 737-717-4000 (or visit them at the front desk if in-person)

After the Appointment:

□ Update the session status in DaySmart to complete or no-show

□ If you need more time for ETO data entry, reserve an office space in DaySmart; plan to have all data entered within two days of the appointment

□ Log out of all systems and remove client documents from the browser's downloads

□ If meeting by phone and you need to share a document/resource, email it to the client or send it to the volunteer coordinator to pass along to the client

□ If the client wants Foundation Communities to pull their credit report, email the staff contact

□ Direct any follow-up questions to the volunteer coordinator by email or phone