

#	Category	Purpose
1	Consumer Background	Consumer Biographical
2	Consumer Background	Consumer Biographical
3	Consumer Background	Consumer Biographical
4	Consumer Background	Consumer Biographical
5	Consumer Background	Consumer Biographical
6	Consumer Background	Consumer Biographical
7	Consumer Background	Consumer Biographical
7B	Consumer Background	Consumer Biographical
8	Consumer Background	Consumer Biographical
9	Consumer Background	Consumer Biographical
10	Consumer Background	Consumer Biographical
10B	Consumer Background	Consumer Biographical
10C	Consumer Background	Consumer Biographical
11	Consumer Background	Consumer Biographical

11B	Consumer Background	Consumer Biographical
12	Consumer Background	Consumer Biographical
13	Consumer Background	Consumer Biographical
14	Consumer Background	Consumer Biographical
15	Consumer Background	Consumer Biographical
16	Consumer Background	Consumer Biographical
17	Consumer Background	Consumer Biographical
18	Consumer Background	Consumer Biographical
19	Consumer Background	Consumer Biographical
20	Consumer Background	Consumer Biographical
21	Consumer Background	Consumer Biographical
22	Consumer Background	Consumer Biographical
22B	Consumer Background	Consumer Biographical

22D	Consumer Background	Consumer Biographical
23	Consumer Background	Consumer Biographical
24	Coaching History	Consumer Biographical
24B	Coaching History	Consumer Biographical

Indicator
First Name
Last Name
Middle Initial
Date of Birth
Sex
Hispanic/Latino
Race
Race: other write-in text field for
Marital status
Number of children and/or dependents
Educational Background
Educational Background Other Conditional Write-in
Educational Background Student Status
Employment Status

Employment Status/Reason Unable to Work
Average number of hours worked per week
Annual income (before tax)
Does the client receive gov't assistance?
Types of government assistance received
Does the client reside in assisted housing?
Housing Status
Have you ever been evicted from a residence you were the main title-holder for?
Have you ever had your home foreclosed upon that you were the main title-holder for?
Have you ever filed for bankruptcy?
When did you file for bankruptcy?
Are you a Veteran of the US Military?
Date of Separation or Retirement

Do you have a Transition Plan?
Sources of Additional Support
How did you hear about coaching services?
How did you hear about coaching services?

Financial Coaching Data Collection

Values
Write-in name
Write-in name
Write-in name
Date value MM-DD-YYYY
Dropdown: Male/Female
Dropdown: "Yes/No"
Dropdown: Black or African American, White, American Indian or Alaska Native, Asian, Native Hawaiian or Other Pacific Islander
Free text conditional if race select to "other" write in free text entry field for Race: Other
Dropdown: "Never married, Married, Separated, Divorced, Widowed"
Write-in number
Drop-down: less than HS diploma, HS diploma or equivalent (GED), Some post-sec, Vo-tech or technical training certification, Associates degree, bachelor's degree, Master's or higher, other: write in
Free text entry field (conditional, Educational Background select option "other")
Dropdown: Full-time Student, part-time-student, not a student
Dropdown: Self-employed, work full-time, work part-time, homemaker, student, unemployed and seeking work, unable to work, retired

Dropdown: Disabled, full-time caregiver, student/enrolled in training program, other: write in

Write-in number

Write-in, enter dollar amount

Dropdown "Yes"/"No"/"Don't know"

Dropdown: "SNAP/Food stamps", "Unemployment Assistance", "EITC", "WIC", "TANF", "SSI", "SSDI", "Don't know"

Dropdown "Yes"/"No"/"Don't know"

Dropdown: "Owned by you or someone in your household with a mortgage/home equity loan," "Owned by you or someone in your household free and clear," "Rented," or "Occupied without payment of rent"

Dropdown "Yes"/"No"/"Don't know"

Dropdown "Yes"/"No"/"Don't know"

Dropdown "Yes"/"No"/"Don't know"

Date value MM-YYYY

Dropdown "Yes"/"No"/"Don't know"

Date value MM-DD-YYYY

Dropdown: "Yes"/ "No"/ "Don't Know"

Free text field

"site name" (from dynamic option tied to specific coach), "walk-in,", or "other organization"

Free text field conditional if prior selection is set to "other site name"

Justification	EVC's	Vet's		
Allow the coach to establish a relationship with the consumer receiving financial coaching.	X			
Allow the coach to establish a relationship with the consumer receiving financial coaching.	X			
Allow the coach to establish a relationship with the consumer receiving financial coaching.	X			
Coaching: Allow the coach to ascertain how many years remain in the consumer's working life to shed light on potential future income streams; Program Analysis: Allow analysis of program impacts on different age groups.	X			
Allow analysis of program impacts on different demographic	X			
Allow analysis of program impacts on different demographic	X			
Allow analysis of program impacts on different demographic	X			
Allow analysis of program impacts on different demographic	X			
Coaching: Provide coach with information required to establish a family budget and/or to understand the consumer's complete financial situation. Analysis: allow analysis of program impacts on different demographic groups.	X			
Coaching: Provide coach with information required to establish a family budget and/or to understand the consumer's complete financial situation. Analysis: allow analysis of program impacts on different demographic groups.	X			
Coaching: Provide coach with information required to understand the consumer's potential for increased employment income; Anlaysis: allow analysis of program impacts on different demographic groups.	X			
Coaching: Provide coach with information required to understand the consumer's potential for increased employment income; Anlaysis: allow analysis of program impacts on different demographic groups.	X			
Coaching: Provide coach with information required to understand the consumer's potential for increased employment income; Anlaysis: allow analysis of program impacts on different demographic groups.	X			
Coaching: Provide coach with information required to understand the consumer's current income; Anlaysis: allow analysis of program impacts on different demographic groups.	X			

Coaching: Provide coach with information required to understand the consumer's potential for increased employment income; Anlaysis: allow analysis of program impacts on different demographic groups.	X	
Coaching: Provide coach with information required to understand the consumer's potential for increased employment income; Anlaysis: allow analysis of program impacts on different demographic groups.	X	
Coaching: Provide coach with information required to understand the consumer's current income; Anlaysis: allow analysis of program impacts on different demographic groups.	X	
Coaching: Provide coach with information required to understand the consumer's potential for increased income; Anlaysis: allow analysis of program impacts on different demographic groups.	X	
Coaching: Provide coach with information required to understand the consumer's potential for increased income; Anlaysis: allow analysis of program impacts on different demographic groups.	X	
Coaching: Provide coach with information required to understand the consumer's potential for increased income; Anlaysis: allow analysis of program impacts on different demographic groups.	X	
Provide coach with an understanding the consumer's current financial situation including major current expenses.	X	
Provide coach with an understanding of the consumer's past financial hardships and demonstrated ability to handle finances well.	X	
Provide coach with an understanding of the consumer's past financial hardships and demonstrated ability to handle finances well.	X	
Provide coach with an understanding of the consumer's past financial hardships and demonstrated ability to handle finances well.	X	
Provide coach with an understanding of the consumer's past financial hardships and demonstrated ability to handle finances well.	X	
Determine whether the consumer falls into the targetted demographic group.	X	
Determine whether the consumer falls into the targetted demographic group.	X	

Provide coach with an understanding of interrelated services already provided by the Federal Government.	X	
Provide coach with information required to understand the consumer's current income	X	
Evaluate the effectiveness of our site location choices and manage resources appropriately	X	
Evaluate the effectiveness of our site location choices and manage resources appropriately	X	

#	Category	Purpose
26	Coaching History	Consumer Discovery
27	Coaching History	Consumer Discovery
28	Coaching History	Consumer Discovery
28B	Coaching History	Consumer Discovery
29	Coaching history	Consumer Discovery
29B	Coaching history	Consumer Discovery
30	Coaching history	Consumer Discovery
35	Coaching History	Consumer Discovery
36	Banking Usage	Consumer Discovery
37	Banking Usage	Consumer Discovery
38	Banking Usage	Consumer Discovery
39	Banking Usage	Consumer Discovery
40	Banking Usage	Consumer Discovery
41	Banking Usage	Consumer Discovery
42	Banking Usage	Consumer Discovery
43	Banking Usage	Consumer Discovery

44	Banking Usage	Consumer Discovery
45	Banking Usage	Consumer Discovery
46	Fringe Services	Consumer Discovery
47	Fringe Services	Consumer Discovery
48	Fringe Services	Consumer Discovery
49	Fringe Services	Consumer Discovery
50	Fringe Services	Consumer Discovery
51	Assets	Consumer Discovery
52	Assets	Consumer Discovery
53	Assets	Consumer Discovery
54	Assets	Consumer Discovery
55	Debts	Consumer Discovery
56	Debts	Consumer Discovery
56B	Debts	Consumer Discovery
57	Debts	Consumer Discovery
57B	Debts	Consumer Discovery
58	Debts	Consumer Discovery
58B	Debts	Consumer Discovery
59	Debts	Consumer Discovery
59B	Debts	Consumer Discovery
60	Debts	Consumer Discovery

60B	Debts	Consumer Discovery
61	Debts	Consumer Discovery
61B	Debts	Consumer Discovery
62	Debts	Consumer Discovery
62B	Debts	Consumer Discovery
63	Debts	Consumer Discovery
63B	Debts	Consumer Discovery
64	Payment History	Consumer Discovery
65	Payment History	Consumer Discovery
66	Financial background	Consumer Discovery
67	Financial background	Consumer Discovery
68	Financial background	Consumer Discovery
69	Financial background	Consumer Discovery
70	Financial background	Consumer Discovery
71	Financial background	Consumer Discovery
71B	Financial background	Consumer Discovery
72	Financial background	Consumer Discovery
73	Financial background	Consumer Discovery
74	Financial background	Consumer Discovery
75	Financial background	Consumer Discovery

76	Financial background	Consumer Discovery
77	Financial background	Consumer Discovery
78	Financial background	Consumer Discovery
79	Financial background	Consumer Discovery

Indicator
Who initiated coaching session?
Date of coaching session
Presenting issue
Presenting issue - Other Write-in
Client goals pre-coaching
Client goals pre-coaching
Baseline progress on goals
Previous coaching receipt?
Checking account?
Checking account balance
Savings account?
Savings account balance
Has retirement savings account
Retirement savings account balance
Has investment accounts
Investment account balance

Do you currently have direct deposit set up?
In the past 3 months have you used automatic transfers to put money away for future use, such as saving for retirement or education?
Used check cashers in past 3 months
Used payday lender in past 3 months
Used refund anticipation loan/check in past 3 months
Used auto-title loan in past 3 months
Used pawn shop in past 3 months
Mortgage on a home
Value of home?
Automobile
Value of automobile?
Number of credit cards
Credit card debt
Credit card debt
Student loans
Student loans
Mortgage loans
Mortgage loans
Car loans
Car loans
Personal loans

Personal loans
Unpaid medical bills
Unpaid medical bills
Home Improvement loans
Home Improvement loans
Unpaid taxes
Unpaid taxes
How often do you pay your bills on time?
How many late fees on loans or bills in past 3 mos.
How confident are you in your ability to achieve a financial goal that you set for yourself today?
Have you used a budget in the past 3 months?
How closely do you stick to your budget?
Have you set aside emergency or rainy day funds that would cover your expenses for 3 months, in case of sickness, job loss, economic downturn, or other emergencies?
Could you get \$2,000 to cover an emergency if you needed to?
How would you get the \$2,000?
How would you get the \$2,000?
Expenses exceed income
How would you rate your own credit?
Has a credit file?
Credit score?

Savings pattern
Have you ever pulled your own credit report?
Understands credit report?
Financial Stress Scale

Financial Coaching Data Collection

Values
"Coach," "Client"
Date value MM-DD-YYYY
Dropdown values: "Credit-related," "Debt-related," "Budgeting/money-management related," "Savings-related" "Other - WRITE IN"
Free text field conditional if Presenting issue select to "other" write in free text entry field for: Other
Dropdown values: "No goal" "Increase non-retirement savings," "increase retirement savings," increase savings for children's education," "homeownership or home rental," "a large purchase (i.e. car or vacation)," "education/training," "starting or improving my own business," "improving credit," "paying down debts," "improving my money management and budgeting skills," "improving my household's financial security," "other" (write-in)
Free text field conditional if previous menu selector set to "other"
Dropdown values: "None," "A little," "Some," "A lot"
Dropdown values: "Yes"/"No"/"Don't know"
Dropdown: "Yes"/"No"/"Don't know"
Write in amount
Dropdown: "Yes"/"No"/"Don't know"
Write in amount
Dropdown: "Yes"/"No"/"Don't know"
Write in amount
Dropdown: "Yes"/"No"/"Don't know"
Write in amount

Dropdown: "Yes"/"No"/"Don't know"
Dropdown: "Yes"/"No"/"Don't know"
Dropdown: "Yes"/"No"/"Don't know"
Dropdown: "Yes"/"No"/"Don't know"
Dropdown: "Yes"/"No"/"Don't know"
Dropdown: "Yes"/"No"/"Don't know"
Dropdown: "Yes"/"No"/"Don't know"
Dropdown: "Yes"/"No"/"Don't know"
Write in amount
Dropdown: "Yes"/"No"/"Don't know"
Write in amount
Write in number
Dropdown: "Yes"/"No"
Free text field conditional if previous menu selector set to "Yes"
Dropdown: "Yes"/"No"
Free text field conditional if previous menu selector set to "Yes"
Dropdown: "Yes"/"No"
Free text field conditional if previous menu selector set to "Yes"
Dropdown: "Yes"/"No"
Free text field conditional if previous menu selector set to "Yes"
Dropdown: "Yes"/"No"

Free text field conditional if previous menu selector set to "Yes"
Dropdown: "Yes"/"No"
Free text field conditional if previous menu selector set to "Yes"
Dropdown: "Yes"/"No"
Free text field conditional if previous menu selector set to "Yes"
Dropdown: "Yes"/"No"
Free text field conditional if previous menu selector set to "Yes"
Dropdown: "always" "often" "sometimes" "rarely" "never" "don't know"
Dropdown: "None (0)," "A few (1-2)" "Many (3+)"
Dropdown: "Not at all confident," "Less than confident," "Somewhat confident," "Relatively confident," "Very confident"
Dropdown: "Yes," "No," "Don't know"
Dropdown: "Very closely," "Somewhat closely," "Not very closely," "Don't know"
Dropdown: "Yes," "No," "Don't know"
Dropdown: "Yes," "No," "Don't know"
Dropdown: "My personal savings, cashing in retirement or investment accounts, borrowing from friends and family, alternative financial services such as payday lender or pawn shop, or other: please specify"
Free text field conditional if previous menu selector set to "other"
Dropdown: "Yes," "No," "Don't know"
Dropdown: "Very bad," "Bad," "About average," "Good," "Very good," "Don't know"
Dropdown: "Yes," "No," "Don't know"
Enter number or "Don't know"

Dropdown "Every month, "Every other month", "Every few months," "Never"

Dropdown: "Yes," "No," "Don't know"

"Yes," "Somewhat," "No," "Don't know"

Dropdown 0-7 (0 being no stress, 7 overwhelming stress)

Justification	EVC's	Vet's
Document the consumer's level of commitment to actively engage the coach in the coaching service	X	
Provide a record of the number of sessions conducted in a coaching cycle and facilitate the review of the records by the coach when necessary to continue with the coaching cycle.	X	
Coaching: Identify the major topics that the consumer wants to receive coaching on; Analysis: allow the program to analyze the uses to which consumers are putting the coaching services.	X	
Coaching: Identify the major topics that the consumer wants to receive coaching on; Analysis: allow the program to analyze the uses to which consumers are putting the coaching services.	X	
Coaching: Identify the major topics that the consumer wants to receive coaching on; Analysis: allow the program to analyze the uses to which consumers are putting the coaching services.	X	
Coaching: Identify the major topics that the consumer wants to receive coaching on; Analysis: allow the program to analyze the uses to which consumers are putting the coaching services.	X	
Coaching: Identify the progress already made by the consumer before formal coaching begins; Analysis: allow the program to analyze the uses to which consumers are putting the coaching services.	X	
Coaching: Identify the progress already made by the consumer before formal coaching begins; Analysis: allow the program to analyze the uses to which consumers are putting the coaching services.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	

Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	
Provide the coach with an understanding of the consumer's existing financial resources.	X	

#	Category	Purpose
94	Coach Background	Coach Data
95	Coach Background	Coach Data
96	Coach Background	Coach Data
97	Coach Background	Coach Data
98	Coach Background	Coach Data
99	Coach Background	Coach Data
100	Coach Performance	Automated Metric
101	Coach Performance	Automated Metric
102	Coach Performance	Automated Metric
103	Coach Performance	Automated Metric
104	Coach Performance	Automated Metric

Indicator
First Name
Last Name
Middle Initial
Date of Birth
Primary Site Location
Secondary Site Location
Quantity of Total Consumers Served
Quantity of EVC's Served
Quantity of Vets Served
Time Spent Servicing Each Consumer
Total Time Spent Servicing Consumers

Financial Coaching Data Collection

Values
Write-in name
Write-in name
Write-in initial
Date value MM-DD-YYYY
Dropdown: All Locations
Dropdown: All Locations
Count of Coach's Records
Count of Coach's Records
Count of Coach's Records
Date and time value: "Start Time MM-DD-YYYY XX:XX:XX AM/PM", "Finish Time MM-DD-YYYY XX:XX:XX AM/PM". FT - ST = Time Spent Servicing Consumer
Total Sum of Date and time value: "Start Time MM-DD-YYYY XX:XX:XX AM/PM", "Finish Time MM-DD-YYYY XX:XX:XX AM/PM". Sum of All (FT - ST) = Time Spent Servicing Consumers

Justification	EVC's	Vet's
Record who provided the financial coaching service	X	
Record who provided the financial coaching service	X	
Record who provided the financial coaching service	X	
Record who provided the financial coaching service	X	
Allow for aggregate reports of program impacts at the various locations	X	
Allow for aggregate reports of program impacts at the various locations	X	
Allow for aggregate reports of program impacts at the various locations	X	
Allow for aggregate reports of program impacts at the various locations and towards the two target groups	X	
Allow for aggregate reports of program impacts at the various locations and towards the two target groups	X	
Conduct analysis and provide updated training	X	
Conduct analysis and provide updated training	X	

#	Category	Purpose
105	Site Details	Site Data
106	Site Details	Site Data
107	Site Operations	Automated Metric
108	Site Operations	Automated Metric
109	Site Operations	Automated Metric
110		
	Site Operations	Automated Metric
111	Site Operations	Automated Metric

Financial Coaching Data Collection

Values
Dropdown: All Sites
Dropdown: All Coaches
Count of Records
Count of Records
Count of Records
<p>Count of Dropdown Entries: "Created a budget," "Transferring credit card balances to reduce APR," "Paying off large portion of credit card debt with tax refund," "Greatly reducing monthly phone payment," "Greatly reducing cable bill," "Reduced levels of financial stress," "Has created and tracked budget," "Learned to pull credit score," "Has minimized unnecessary spending," "Has been saving more and using these savings to pay down credit cards at faster rate," "Improved credit score," "Paid outstanding bills," "Removed incorrect information from credit report," "Learned to understand credit report," "Opened secured credit card," "Opened savings accounts," "Learned to "pay myself first" and set up monthly savings contributions," "Used tools like CreditKarma.com to track credit score," "Learned to pay off highest interest credit cards first," "Paid off car loans," "Became connected with public benefits," "Learned not to spend more than 30 percent of credit limit, ideally not go over 10 percent," "Lowered phone bill by switching to a cheaper plan," "Stopped going to alternative financial service providers," "Applied for income-based repayment for student loans," "Used web money-management tools, like mint.com to track spending and expenses,"</p>
<p>Total Sum of Date and time value: "Start Time MM-DD-YYYY XX:XX:XX AM/PM", "Finish Time MM-DD-YYYY XX:XX:XX AM/PM". Sum of All (FT - ST) = Time Spent Servicing Consumers</p>

Justification	EVC's
Record the locations that financial coaching services are being provided and facilitate the analysis of data by site	X
Associate coaches with the sites at which they are situated	X
Provide aggregate data for analysis to evaluate the successful selection of coaching sites	X
Provide aggregate data for analysis to evaluate the successful selection of coaching sites	X
Provide aggregate data for analysis to evaluate the successful selection of coaching sites	X
Provide aggregate data for analysis to evaluate the successful selection of coaching sites	X
Provide aggregate data for analysis to evaluate the successful selection of coaching sites	X

Vet's
X
X

#	Category	Purpose
25	Coaching History	Session Data
31	Coaching History	Session Data
31B	Coaching History	Session Data
32	Coaching History	Session Data
32B	Coaching History	Session Data
33	Coaching History	Session Data
33B	Coaching History	Session Data

34	Coaching History	Session Data
34B	Coaching History	Session Data
80	Meeting Information	Session Data
81	Meeting Information	Session Data
82	Meeting Information	Session Data
83	Meeting Information	Session Data
83B	Meeting Information	Session Data
84	Meeting Information	Session Data
85	Meeting Information	Session Data
86	Meeting Information	Session Data
87	Meeting Information	Session Data
88	Meeting Information	Session Data
89	Survey Questions	Session Data
90	Survey Questions	Session Data

91	Survey Questions	Session Data
92	Survey Questions	Session Data
93	Survey Questions	Session Data

Indicator
Coaching session number
Topics covered during coaching session
Topics covered during coaching session
Goals set during coaching session
Goals set during coaching session
Achievements during coaching session
Achievements during coaching session

Achievements between coaching sessions
Achievements between coaching sessions
Start Time
Finish Time
Site Location
Meeting Method
Meeting Method
Case Notes
Referrals?
Referrals?
Meeting Type
Confidentiality Agreement Signed?
Do you currently have a personal budget, spending plan or financial plan
How confident are you in your ability to achieve your financial goals?

Do you have money put away for an emergency or unexpected expenses?

Is you spending on your living expenses less than your total income?

In the last 30 days, have you been charged a late fee on a loan or bill?

Financial Coaching Data Collection

Values
Numerical value
Dropdown values: "Credit-related," "Debt-related," "Budgeting/money-management related," "Savings-related" "Other - WRITE IN"
Free text field conditional if previous menu selector set to "other"
Dropdown values: "Increase non-retirement savings," "increase retirement savings," "increase savings for children's education," "homeownership or home rental," "a large purchase (i.e. car or vacation)," "education/training," "starting or improving my own business," "improving credit," "paying down debts," "improving my money management and budgeting skills," "improving my household's financial security," "other" (write-in)
Free text field to capture specific goals in the Consumer's own words
Dropdown: "Created a budget," "Transferring credit card balances to reduce APR," "Paying off large portion of credit card debt with tax refund," "Greatly reducing monthly phone payment," "Greatly reducing cable bill," "Reduced levels of financial stress," "Has created and tracked budget," "Learned to pull credit score," "Has minimized unnecessary spending," "Has been saving more and using these savings to pay down credit cards at faster rate," "Improved credit score," "Paid outstanding bills," "Removed incorrect information from credit report," "Learned to understand credit report," "Opened secured credit card," "Opened savings accounts," "Learned to "pay myself first" and set up monthly savings contributions," "Used tools like CreditKarma.com to track credit score," "Learned to pay off highest interest credit cards first," "Paid off car loans," "Became connected with public benefits," "Learned not to spend more than 30 percent of credit limit, ideally not go over 10 percent," "Lowered phone bill by switching to a cheaper plan," "Stopped going to alternative financial service providers," "Applied for income-based repayment for student loans," "Used web money-management tools, like mint.com to track spending and expenses," OTHER PLEASE SPECIFY
Free text field to capture specific goals in the Consumer's own words

Dropdown: "Created a budget," "Transferring credit card balances to reduce APR," "Paying off large portion of credit card debt with tax refund," "Greatly reducing monthly phone payment," "Greatly reducing cable bill," "Reduced levels of financial stress," "Has created and tracked budget," "Learned to pull credit score," "Has minimized unnecessary spending," "Has been saving more and using these savings to pay down credit cards at faster rate," "Improved credit score," "Paid outstanding bills," "Removed incorrect information from credit report," "Learned to understand credit report," "Opened secured credit card," "Opened savings accounts," "Learned to "pay myself first" and set up monthly savings contributions," "Used tools like CreditKarma.com to track credit score," "Learned to pay off highest interest credit cards first," "Paid off car loans," "Became connected with public benefits," "Learned not to spend more than 30 percent of credit limit, ideally not go over 10 percent," "Lowered phone bill by switching to a cheaper plan," "Stopped going to alternative financial service providers," "Applied for income-based repayment for student loans," "Used web money-management tools, like mint.com to track spending and expenses," OTHER PLEASE SPECIFY

Free text field to capture specific goals in the Consumer's own words

Date and time value: "Start Time MM-DD-YYYY XX:XX:XX AM/PM"

Date and time value: "Finish Time MM-DD-YYYY XX:XX:XX AM/PM"

Dropdown: All Locations; Default set to Coaches Primary Location

Dropdown: "In Person", "Phone", "Other"

Free text field conditional if previous menu selector set to "other"

Free Text Field

Dropdown: "Yes," "No"

Free text field conditional if previous menu selector set to "Yes"

Dropdown: "Financial Coaching" (Recurring Sessions), "Financial Councelling" (One-off Meeting)

Dropdown: "Yes," "No"

Radio Buttons: "Yes", "No"

Radio Buttons: "Not at all confident", "Somewhat confident", "Very Confident", "Extremely Confident"

Radio Buttons: "Yes", "No"

Radio Buttons: "Yes", "No"

Radio Buttons: "Yes", "No"

Justification	EVC's
Provide a record of the number of sessions conducted in a coaching cycle and facilitate the review of the records by the coach when necessary to continue with the coaching cycle.	X
Coaching: Identify the major topics that the consumer wants to receive coaching on; Anlaysia: allow the program to analyze the uses to which consumers are putting the coaching services.	X
Coaching: Identify the major topics that the consumer wants to receive coaching on; Anlaysia: allow the program to analyze the uses to which consumers are putting the coaching services.	X
Coaching: Facilitate the agreement between the coach and the consumer on the consumer's goals for financial progress; Anlaysia: allow the program to analyze the uses to which consumers are putting the coaching services.	X
consumers are putting the coaching services.	X
Coaching: Record the concrete steps made towards achieving the consumer's goals to facilitate future review by the coach and discussion with the consumer; Anlaysia: allow the program to analyze the uses to which consumers are putting the coaching services.	X
Coaching: Record the concrete steps made towards achieving the consumer's goals to facilitate future review by the coach and discussion with the consumer; Anlaysia: allow the program to analyze the uses to which consumers are putting the coaching services.	X

Coaching: Record the concrete steps made towards achieving the consumer's goals to facilitate future review by the coach and discussion with the consumer; Analysis: allow the program to analyze the uses to which consumers are putting the coaching services.	X
Coaching: Record the concrete steps made towards achieving the consumer's goals to facilitate future review by the coach and discussion with the consumer; Analysis: allow the program to analyze the uses to which consumers are putting the coaching services.	X
Allow analysis of the time coaches spend with consumers	X
Allow analysis of the time coaches spend with consumers	X
Allow analysis of program effectiveness to be conducted by site enabling the program to evaluate the appropriateness of the site selections	X
Allow analysis of program effectiveness to be conducted by site enabling the program to evaluate the appropriateness of the site selections	X
Allow analysis of program effectiveness to be conducted by site enabling the program to evaluate the appropriateness of the site selections	X
Provide a record of the session so that the coach can reengage the consumer at a future session with no need to rediscover pertinent information	X
Record when a coach is sending a consumer to another organization for benefits or services tangential to financial coaching	X
Record when a coach is sending a consumer to another organization for benefits or services tangential to financial coaching	X
Provide the coach with a clear understanding of the consumer's commitment to return and complete the prescribed number of coaching sessions	X
Ensure that the coach and consumer have a signed confidentiality agreement	X
Provide the coach with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness	X
Provide the coach with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness	X

Provide the coach with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness	X
Provide the coach with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness	X
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