

PRA

OMB Control Number: 3170-00xx

#	Category	Purpose	Indicator
1	Consumer Background	Consumer Biographical	First Name
2	Consumer Background	Consumer Biographical	Middle Initial
3	Consumer Background	Consumer Biographical	Last Name
4	Consumer Background	Consumer Biographical	Street Address
5	Consumer Background	Consumer Biographical	Zip
6	Consumer Background	Consumer Biographical	Email
7	Consumer Background	Consumer Biographical	Primary Phone
8	Consumer Background	Consumer Biographical	DOB
9	Consumer Background	Consumer Biographical	Gender (expression of identity)
10	Consumer Background	Consumer Biographical	Ethnicity:
11	Consumer Background	Consumer Biographical	Race
12	Consumer Background	Consumer Biographical	Nativity
13	Consumer Background	Consumer Biographical	Marital Status
14	Consumer Background	Consumer Biographical	Language Preference
15	Consumer Background	Consumer Biographical	Other Language
16	Consumer Background	Consumer Biographical	Highest level of Education completed
17	Consumer Background	Consumer Biographical	Do you or a family member living in your household have a disability?
18	Consumer Background	Consumer Biographical	Type of Disability
19	Consumer Background	Consumer Biographical	Are you or a family member (non-member of the immediate family)
20	Consumer Background	Consumer Biographical	If Yes, what best describes you?
21	Consumer Background	Consumer Biographical	If Yes, what branch?
22	Consumer Background	Consumer Biographical	Are you a student taking courses for credit?
23	Consumer Background	Consumer Biographical	How did you hear about this program?
25	Consumer Background	Consumer Biographical	Did you attend one or more of group class?
33	Consumer Background	Consumer Biographical	Household composition
34	Consumer Background	Consumer Biographical	Employment status
35	Consumer Background	Consumer Biographical	Are you currently receiving support in your employment search? Yes/No
36	Consumer Background	Consumer Biographical	If answered yes, from which agency/organization?
37	Consumer Background	Consumer Biographical	Employer type details
38	Consumer Background	Consumer Biographical	Hourly pay
39	Consumer Background	Consumer Biographical	Number of hours worked per week on average
40	Consumer Background	Consumer Biographical	Paid leave
41	Consumer Background	Consumer Biographical	Current employee benefits
42	Consumer Background	Consumer Biographical	Employed Since
43	Consumer Background	Consumer Biographical	If No Job, Unemployed since (date)
44	Consumer Background	Consumer Biographical	Are you aware of Social Security Administration Work Incentive counseling services with return to work focus

45	Consumer Background	Consumer Biographical	What, if any, educational path is participant pursuing?
46	Consumer Background	Consumer Biographical	If HS/GED, what progress?
47	Consumer Background	Consumer Biographical	If College, what progress?
48	Consumer Background	Consumer Biographical	If Vocational certificate, what progress?

Value Type	Values
Open Text	Write-in name
Open Text	Write-in name
Open Text	Write-in name
Open Text	Write-in address
Open Text	Write-in address
Valid email	Write-in email
Phone Number	Number value (###) ###-####
Valid Date	Date value MM-DD-YYYY
Dropdown	Male, Female
Dropdown	Not Hispanic or Latino
Dropdown	Other
Dropdown	Foreign born non-citizen
Dropdown	Common Law
Dropdown	English, Spanish, Chinese, American Sign Language, Other write in
Open Text	Other (write in)
Dropdown	College, Associate's Degree, Bachelor's Degree, More Than College
Multi-select	Self, Spouse, Dependent, Other, No disability present
Dropdown	Other
Dropdown	Yes, No, Self, Member of Immediate Family
Dropdown	Active-duty
Dropdown	Coast Guard
Dropdown	Other
Open Text	Fillable text box
Dropdown	Others?
each category	you
Dropdown	Employed, satisfied
Dropdown	Yes, No
Open Text	Write in
Open Text	
Numerical form	(\$)
Numerical form	(Hours)
Dropdown	Yes, No
Dropdown	Health insurance, 401K, Life Insurance, Other
Valid Date	(Date)
Valid Date	(Date)
Dropdown	Yes, No, Want to know more

Dropdown	None, HS/GED, College, Vocational certificate
Dropdown	Not enrolled, Enrolled and in danger of dropping out, Enrolled and on track to completing, Obtained HS diploma/GED
Dropdown	Not enrolled Enrolled and in danger of dropping out Enrolled and on track to completing Obtained 2-year college diploma Obtained 4-year college diploma
Dropdown	Not enrolled Enrolled and in danger of dropping out Enrolled and on track to completing Obtained vocational certificate

Justification	Questions or Source
with the consumer receiving financial coaching.	Social Solutions Internal
with the consumer receiving financial coaching.	Social Solutions Internal
with the consumer receiving financial coaching.	Social Solutions Internal
with the consumer receiving financial coaching.	Social Solutions Internal
with the consumer receiving financial coaching.	Social Solutions Internal
with the consumer receiving financial coaching.	Social Solutions Internal
with the consumer receiving financial coaching.	Social Solutions Internal
age groups.	Social Solutions Internal
demographic groups.	Social Solutions Internal
demographic groups.	Social Solutions Internal
demographic groups.	Social Solutions Internal
demographic groups	Social Solutions Internal
demographic groups.	Social Solutions Internal
language the client prefers to get services	Social Solutions Internal
language the client prefers to get services	Social Solutions Internal
of program impacts on different demographic groups.	Social Solutions Internal
demographic groups.	National Disability Institute
demographic groups.	National Disability Institute
demographic groups.	September 2010.
demographic groups.	Social Solutions Internal
demographic groups.	Social Solutions Internal
demographic groups.	Social Solutions Internal
Allow analysis of impacts of communications techniques	Question
impacts on different demographic groups.	National Disability Institute
demographic groups.	Social Solutions
of program impacts on different demographic groups.	Social Solutions
of program impacts on different demographic groups.	Question
Detail provided on services for program enhancement	Question
of program impacts on different demographic groups.	Social Solutions
demographic groups.	Social Solutions
demographic groups.	Social Solutions
demographic groups.	Social Solutions
impacts on different demographic groups.	Social Solutions
Coaching: Provide coach/counselor with information required to understand the consumer's potential for increased income; Analysis: allow analysis of program impacts on different demographic groups.	Social Solutions
Coaching: Provide coach/counselor with information required to understand the consumer's potential for increased income; Analysis: allow analysis of program impacts on different demographic groups.	Social Solutions

Coaching: Provide coach/counselor with information required to understand the consumer's potential for increased income; Analysis: allow analysis of program impacts on different demographic groups.	Social Solutions
Coaching: Provide coach/counselor with information required to understand the consumer's potential for increased income; Analysis: allow analysis of program impacts on different demographic groups.	Social Solutions
Coaching: Provide coach/counselor with information required to understand the consumer's potential for increased income; Analysis: allow analysis of program impacts on different demographic groups.	Social Solutions
Coaching: Provide coach/counselor with information required to understand the consumer's potential for increased income; Analysis: allow analysis of program impacts on different demographic groups.	Social Solutions






931  
596  
36%

To document referral source, expand partnerships

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OMB Control Number: 3170-00xx

#	Category	Purpose
24	Coaching History	Consumer Discovery
26	Coaching History	Consumer Discovery
27	Coaching History	Consumer Discovery
28	Benefits Usage	Consumer Discovery
29	Benefits Usage	Consumer Discovery
30	Benefits Usage	Consumer Discovery
31	Benefits Usage	Consumer Discovery
32	Benefits Usage	Consumer Discovery
49	Assets	Consumer Discovery
50	Debts	Consumer Discovery
51	Debts	Consumer Discovery
52	Debts	Consumer Discovery
53	Credit	Consumer Discovery
54	Credit	Consumer Discovery
55	Credit	Consumer Discovery
56	Credit	Consumer Discovery
57	Credit	Consumer Discovery
58	Credit	Consumer Discovery
59	Credit	Consumer Discovery
60	Debts	Consumer Discovery
61	Debts	Consumer Discovery
62	Debts	Consumer Discovery
63	Debts	Consumer Discovery
64	Consumer Protection	Consumer Discovery
65	Consumer Protection	Consumer Discovery
66	Consumer Protection	Consumer Discovery
67	Consumer Protection	Consumer Discovery
68	Consumer Protection	Consumer Discovery
69	Consumer Protection	Consumer Discovery
70	Consumer Background	Consumer Discovery
71	Consumer Background	Consumer Discovery
72	Financial Background	Consumer Discovery
73	Financial Background	Consumer Discovery
74	Banking Usage	Consumer Discovery
75	Banking Usage	Consumer Discovery
76	Banking Usage	Consumer Discovery
77	Banking Usage	Consumer Discovery
78	Financial Background	Consumer Discovery

79	Financial Background	Consumer Discovery
80	Fringe Services	Consumer Discovery
81	Financial Background	Consumer Discovery
82	Coaching History	Consumer Discovery
83	Coaching History	Consumer Discovery
84	Coaching History	Consumer Discovery
85	Financial Background	Consumer Discovery
86	Financial Background	Consumer Discovery
87	Financial Background	Consumer Discovery

88	Financial Background	Consumer Discovery
89	Financial Background	Consumer Discovery
90	Financial Attitudes	Consumer Discovery
91	Financial Attitudes	Consumer Discovery
92	Financial Background	Consumer Discovery
93	Financial Attitudes	Consumer Discovery
94	Financial Attitudes	Consumer Discovery

95	Financial Attitudes	Consumer Discovery
96	Financial Background	Consumer Discovery
97	Financial Background	Consumer Discovery
98	Financial Background	Consumer Discovery
99	Financial Background	Consumer Discovery
100	Financial Background	Consumer Discovery
101	Financial Background	Consumer Discovery
102	Coaching History	Consumer Discovery
103	Coaching History	Consumer Discovery

104	Coaching History	Consumer Discovery
105	Coaching History	Consumer Discovery
106	Coaching History	Consumer Discovery
107	Coaching History	Consumer Discovery
108	Coaching History	Consumer Discovery
109	Coaching History	Consumer Discovery

110	Self Sufficiency Matrix	Consumer Discovery
111	Self Sufficiency Matrix	Consumer Discovery
112	Self Sufficiency Matrix	Consumer Discovery
113	Self Sufficiency Matrix	Consumer Discovery
114	Self Sufficiency Matrix	Consumer Discovery



115	Self Sufficiency Matrix	Consumer Discovery
116	Self Sufficiency Matrix	Consumer Discovery
117	Self Sufficiency Matrix	Consumer Discovery
118	Self Sufficiency Matrix	Consumer Discovery

119	Self Sufficiency Matrix	Consumer Discovery
120	Self Sufficiency Matrix	Consumer Discovery
121	Self Sufficiency Matrix	Consumer Discovery
122	Self Sufficiency Matrix	Consumer Discovery

123	Self Sufficiency Matrix	Consumer Discovery
124	Self Sufficiency Matrix	Consumer Discovery
125	Self Sufficiency Matrix	Consumer Discovery

126	Self Sufficiency Matrix	Consumer Discovery
127	Coaching History	Consumer Discovery
128	Coaching History	Consumer Discovery
129	Coaching History	Consumer Discovery
130	Coaching History	Consumer Discovery
131	Coaching History	Consumer Discovery
132	Coaching History	Consumer Discovery
133	Coaching History	Consumer Discovery

Indicator	Value Type
Would you like to meet with a financial coach?	Dropdown
Rehabilitation Client?	Dropdown
Workforce Investment System?	Dropdown
Do you receive WIC	Dropdown
Do you receive SNAP (food stamps)?	Dropdown
Do you receive TANF?	Dropdown
Total monthly non-cash benefits	Multi-select
Total monthly cash benefits/income amount	benefit amount
Do you own any or all of the following assets?	Dropdown
cards do you have?	Numerical form
have:	category
regarding paying off your debt?	Dropdown
How would you describe your use of credit?	Dropdown
Consumer report (credit report) status	Dropdown
never pulled his/her credit report?	Dropdown
does the participant review his/her credit record?	Dropdown
What do you believe is your current credit score?	Dropdown
How sure are you of this score?	Dropdown
Most recent credit report, score and date	Numerical form
Did you file your income taxes? (Yes, No)	Dropdown
Do you have access to free tax assistance?	Dropdown
credit?	Dropdown
you use	Dropdown
improper use of your money?	Dropdown
abuse?	Dropdown
consumer financial product or service?	Dropdown
collector?	Dropdown
to the Consumer Financial Protection Bureau?	Dropdown
your identify?	Dropdown
situation?	Dropdown
disabilities are living in the same house?	Numerical form
household's finances?	Dropdown
decisions for your household?	Dropdown
have a checking or savings account?	Dropdown
members currently have?	Dropdown
access an account?	Dropdown
program?	Dropdown
Amount of monthly living expenses	category

Amount of total emergency savings	Numerical form
Have you used these alternative loan/alternative financial services at least once? (Past Month, Past six months, Past year, More than a year, Never)	Dropdown
Over the last 3 months, have you followed a personal budget, spending plan, or financial plan?	Dropdown
Do you currently have a least one financial goal?	Dropdown
If Yes, which of these apply?	Dropdown
How confident are you in your ability to achieve a financial goal you set for yourself today?	Dropdown
In the last 3 months, did you use an automatic deposit or transfer to put money away for a future use such as saving for retirement or education?	Dropdown
In the last 3 months, did you manually deposit cash, check or other to put money away for a future use such as saving for retirement or education?	Dropdown
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?	Dropdown

<p>Over the past 3 months, would you say your household's spending was less than, more than or about equal to your income? Please do not include large, one-time purchases such as a house or car.</p>	<p>Dropdown</p>
<p>In the last 3 months, have you paid a late fee on a loan or bill?</p>	<p>Dropdown</p>
<p>Considering your financial, savings, and expenses situation, when you think about big ticket items such as furniture, a refrigerator, an automobile, a television and things like that, do you think it would be:</p>	<p>Dropdown</p>
<p>Would you say your own personal finance situation is better now, worse now or about the same as it was a year ago?</p>	<p>Dropdown</p>
<p>Here are some ways people manage the way they spend and save. Which of these steps have you taken in the last year?</p>	<p>Dropdown</p>
<p>Do you feel better, worse or the same about your financial status compared to six months ago?</p>	<p>Dropdown</p>
<p>How would you describe your savings now when compared to six months ago, better, worse or the same?</p>	<p>Dropdown</p>

How would you describe your debt now when compared to six months ago, better, worse or the same?	Dropdown
In a typical month, how difficult is it for you to cover your expenses and pay all your bills?	Dropdown
Have you set aside any money for after high school education or other training for you or your children?	Dropdown
Have you ever tried to figure out how much you need to save for retirement?	Dropdown
Has your household experienced a large drop in income which you did not expect?	Dropdown
How confident are you that you could come up with \$2000 if an unexpected need arose within the next month?	Dropdown
In the last 5 years have you asked for any advice from a financial professional about any of the following?	Dropdown
Do you take care of your own financial business?	Dropdown
Do you have a financial goal (s) that requires long-term savings or investment?	Dropdown



What will you use your long-term savings/investment for?	Dropdown
What other uses might you use this long-term savings for?	Dropdown
Have you created a plan to achieve your goal?	Dropdown
What is your target date for achieving goal?	Dropdown
What areas can the coach or counselor assist you with to achieve this goal?	Dropdown
Did you achieve a goal?	Dropdown

Housing (select from choices 1 - 5)	Dropdown
Employment (select from choices 1 - 5)	Dropdown
Income (select from choices 1 - 5)	Dropdown
Food (select from choices 1 - 5)	Dropdown
Child Care (select from choices 1 - 5)	Dropdown

Children's Education (select from choices 1 - 5)	Dropdown
Adult Education (select from choices 1 - 5)	Dropdown
Health Care Coverage (select from choices 1 - 5)	Dropdown
Life Skills (select from choices 1 - 5)	Dropdown

Family /Social Relations (select from choices 1 - 5)	Dropdown
Mobility (select from choices 1 - 5)	Dropdown
Community Involvement (select from choices 1 - 5)	Dropdown
Legal (select from choices 1 - 5)	Dropdown

	Dropdown
Mental Health (select from choices 1 - 5)	Dropdown
Substance Abuse (select from choices 1 - 5)	Dropdown
Safety (select from choices 1 - 5)	

Disabilities (select from choices 1 - 5)	Dropdown
What is the area of concern or targeted issue?	Dropdown
If Credit Selected: Most recent credit score	Open Text
Goals set during coaching session	Open Text
Client Activities set during coaching session	Open Text
Target Completion Date	Open Text
What goal achieved?	Open Text
What percentage is complete?	Open Text

Values	Justification
Yes, No	information required to understand the customer's motivations.
Yes, No	demographic specific to customers with disabilities.
Yes, No	income, analyze, and analyze of program impacts on different demographic groups.
Receiving benefit	analyze, and analyze of program impacts on different demographic groups.
Receiving benefit	analyze, and analyze of program impacts on different demographic groups.
Receiving benefit	analyze, and analyze of program impacts on different demographic groups.
Other	analyze, and analyze of program impacts on different demographic groups.
Other	analyze, and analyze of program impacts on different demographic groups.
Other	services.
	to which consumers are paying the existing services.
Support, Rent-to-Own, Other (write in)	services.
payments on target assistance mortgage and student loans	to which consumers are paying the existing services.
make purchases	to which consumers are paying the existing services.
Correct	to which consumers are paying the existing services.
past	to which consumers are paying the existing services.
Regularly – every 12 months or more	services.
Don't Know/Don't have a Credit Score	services.
Don't Know/Don't have a Credit Score	program effectiveness
Enter Score	determination of services
2010-2019)	customers in gaining access to meet quality, trusted services.
Yes, No, I don't know	resources.
Yes, No, I don't know	resources.
Self-prepared via paper forms	resources.
Yes, No	information to ascertain the needs and assets
Yes, No	information to ascertain the needs and assets
Yes, No	information to ascertain the needs and assets
Yes, No	information to ascertain the needs and assets
Yes, No	information to ascertain the needs and assets
Yes, No	information to ascertain the needs and assets
people with disabilities.	resources.
	do not reflect "household income."
DK/Refused	resources.
DK/Refused	resources.
DK/Refused	resources.
DK/Refused	resources.
Don't Know/Refused	resources.
Yes, No	resources.
Contribution to Savings, Other (please specify)	resources.

<p>(\\$)</p>	<p>Provide the coach/counselor with an understanding of the consumer's existing financial resources.</p>
<p>Check Cashing, Money order, Remittance, Payday Loan, Rent-to-own, Pawn Shop, Refund Anticipation Loan</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>Yes, No, I don't know</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>Yes, No</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>Create a plan to use a budget Reduce existing expenses Increase savings Increase income Improve credit score Establish/build credit Pay bills Reduce Debt Access Assistive Technology Loan Fund Access financial products/services Access mortgage lending services Access small business lending resources</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>Not confident, Confident</p>	<p>Provide the coach/counselor with an understanding of the consumer's existing ability to meet goals.</p>
<p>Yes, No, I don't know</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>Yes, No, I don't know</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>Yes, No, I don't know</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>



Less than More than Equal to Don't know	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Yes, No, I don't know	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
An excellent time to buy A good time to buy Only a fair time A poor time to buy	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Better than a year ago Same as a year ago Worse than a year ago	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Cut down on credit card purchases Paid down debt/reduced the amount of money you owe Taken on another credit card Taken out additional loans/borrowed money Postponed the purchase of a major item like an automobile or furniture Taken money out of savings to cover living expenses Sold car or house or other big item Changed living arrangements in order to save money Worked longer hours or taken a second job to earn more money Postponed retirement Put more purchases on your credit card so you didn't have to pay for things immediately Made minimum payments on credit cards rather than paying them off immediately Cut down on non-essential spending like restaurants or vacations Shopped more at discount stores and warehouse clubs Use layaway to make big purchases	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Better, Worse, Same	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Better, Worse, Same	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness

Better, Worse, Same	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Not difficult, Somewhat difficult, Very difficult Very difficult Somewhat difficult Not at all difficult Don't know Prefer not to say	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Yes No Don't Know Prefer not to say	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Yes No Don't Know Prefer not to say	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Yes No Don't Know Prefer not to say	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
I am certain I would come up with the full \$2000 I could probably come up with \$2000 I could probably not come up with \$2000 I am certain I could not come up with \$2000 Don't know Prefer not to say	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Debt counseling Savings or investment Taking out a mortgage or a loan Insurance of any type Tax planning	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Yes, No	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness
Yes No Don't Know Refused Not applicable	Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness

<p>Motor Vehicle  Motor Vehicle Modification  Home  Home Improvement/Modification  Small Business Development  Investment Account  Retirement  Education  Mobility Related Purchase (wheelchair, assistive technology, etc.)  Other</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>To travel back and forth to work  To improve access to employment opportunities  To improve mobility and/or sensory or cognitive functioning (purchase of new wheelchair, Braille reader, VRS phone, prostheses, AT, etc. rehabilitation services/procedures not covered by insurance)  To improve accessibility to apartment or home  To build an employment opportunity for myself  To prepare for my retirement  To take a course to improve job skills</p>	<p>Track long-term savings goal, level of awareness to evaluate program effectiveness, and understand usage for people with disabilities.</p>
<p>Yes  No  Don't Know  Refused  Not applicable</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>0-3 Months  3-6 Months  6- 12 Months  1 -2 Years  3-5 Years  5-10 Years  More than 10 Years</p>	<p>Provide the coach/counselor with an understanding of the consumer's existing ability to set and achieve new goals</p>
<p>Create a plan to use a budget  Reduce existing expenses  Increase savings  Improve credit score  Establish/build credit  Reduce Debt  Access Assistive Technology Loan Fund  Access financial products/services  Access mortgage lending services  Access small business lending resources</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>Yes  No  In Progress</p>	<p>Provide the coach/counselor with an understanding of the consumer's existing ability to set and achieve new goals</p>

<p>Homeless or threatened with eviction. Homeless or threatened with eviction.  In transitional, temporary or substandard housing; and/or current rent/mortgage payment is unaffordable (over 30% of income).  In stable housing that is safe but only marginally adequate.  Household is in safe, adequate subsidized housing.  Household is safe, adequate, unsubsidized housing.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>No job.  Temporary, part-time or seasonal; inadequate pay, no benefits.  Employed full time; inadequate pay; few or no benefits.  Employed full time with adequate pay and benefits.  Maintains permanent employment with adequate income and benefits.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>No income.  Inadequate income and/or spontaneous or inappropriate spending.  Can meet basic needs with subsidy; appropriate spending.  Can meet basic needs and manage debt without assistance.  Income is sufficient, well managed; has discretionary income and is able to save.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>No food or means to prepare it. Relies to a significant degree on other sources of free or low-cost food. No food or means to prepare it. Relies to a significant degree on other sources of free or low-cost food.  Household is on food stamps.  Can meet basic food needs, but requires occasional assistance.  Can meet basic food needs without assistance.  Can choose to purchase any food household desires.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>Needs childcare, but none is available/accessible and/or child is not eligible. Childcare is unreliable or unaffordable, inadequate supervision is a problem for childcare that is available.  Affordable subsidized childcare is available, but limited.  Reliable, affordable childcare is available, no need for subsidies.  Able to select quality childcare of choice.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>

<p>One or more school-aged children not enrolled in school. One or more school-aged children not enrolled in school.</p> <p>One or more school-aged children enrolled in school, but not attending classes.</p> <p>Enrolled in school, but one or more children only occasionally attending classes.</p> <p>Enrolled in school and attending classes most of the time.</p> <p>All school-aged children enrolled and attending on a regular basis.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>Literacy problems and/or no high school diploma/GED are serious barriers to employment.</p> <p>Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment.</p> <p>Has high school diploma/GED.</p> <p>Needs additional education/training to improve employment situation and/or to resolve literacy problems to where they are able to function effectively in society.</p> <p>Has completed education/training needed to become employable. No literacy problems.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>No medical coverage with immediate need.</p> <p>No medical coverage and great difficulty accessing medical care when needed. Some household members may be in poor health.</p> <p>Some members (e.g. Children) have medical coverage.</p> <p>All members can get medical care when needed, but may strain budget.</p> <p>All members are covered by affordable, adequate health insurance.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>Unable to meet basic needs such as hygiene, food, activities of daily living.</p> <p>Can meet a few but not all needs of daily living without assistance.</p> <p>Can meet most but not all daily living needs without assistance.</p> <p>Able to meet all basic needs of daily living without assistance.</p> <p>Able to provide beyond basic needs of daily living for self and family.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>

<p>Lack of necessary support from family or friends; abuse (DV, child) is present or there is child neglect.</p> <p>Family/friends may be supportive, but lack ability or resources to help; family members do not relate well with one another; potential for abuse or neglect.</p> <p>Some support from family/friends; family members acknowledge and seek to change negative behaviors; are learning to communicate and support.</p> <p>Strong support from family or friends. Household members support each other's efforts.</p> <p>Has healthy/expanding support network; household is stable and communication is consistently open.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>No access to transportation, public or private; may have car that is inoperable.</p> <p>Transportation is available, but unreliable, unpredictable, unaffordable; may have car but no insurance, license, etc.</p> <p>Transportation is available and reliable, but limited and/or inconvenient; drivers are licensed and minimally insured.</p> <p>Transportation is generally accessible to meet basic travel needs.</p> <p>Transportation is readily available and affordable; car is adequately insured.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>Not applicable due to crisis situation; in "survival" mode.</p> <p>Socially isolated and/or no social skills and/or lacks motivation to become involved.</p> <p>Lacks knowledge of ways to become involved.</p> <p>Some community involvement (advisory group, support group), but has barriers such as transportation, childcare issues.</p> <p>Actively involved in community.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>Current outstanding tickets or warrants.</p> <p>Current charges/trial pending, noncompliance with probation/parole.</p> <p>Fully compliant with probation/parole terms.</p> <p>Has successfully completed probation/parole within past 12 months, no new charges filed.</p> <p>No active criminal justice involvement in more than 12 months and/or no felony criminal history.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>

<p>Danger to self or others; recurring suicidal ideation; experiencing severe difficulty in day-to-day life due to psychological problems.  Recurrent mental health symptoms that may affect behavior, but not a danger to self/others; persistent problems with functioning due to mental health symptoms.  Mild symptoms may be present but are transient; only moderate difficulty in functioning due to mental health problems.  Minimal symptoms that are expectable responses to life stressors; only slight impairment in functioning.  Symptoms are absent or rare; good or superior functioning in wide range of activities; no more than every day problems or concerns.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>Meets criteria for severe abuse/dependence; resulting problems so severe that institutional living or hospitalization may be necessary.  Meets criteria for dependence; preoccupation with use and/or obtaining drugs/alcohol; withdrawal or withdrawal avoidance behaviors evident; use results in avoidance or neglect of essential life activities.  Use within last 6 months; evidence of persistent or recurrent social, occupational, emotional or physical problems related to use (such as disruptive behavior or housing problems); problems have persisted for at least one month.  Client has used during last 6 months, but no evidence of persistent or recurrent social, occupational, emotional, or physical problems related to use; no evidence of recurrent dangerous use.  No drug use/alcohol abuse in last 6 months.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>Home or residence is not safe; immediate level of lethality is extremely high; possible CPS involvement.  Safety is threatened/temporary protection is available; level of lethality is high.  Current level of safety is minimally adequate; ongoing safety planning is essential.  Environment is safe, however, future of such is uncertain; safety planning is important.  Environment is apparently safe and stable.</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>

<p>In crisis – acute or chronic disability affecting housing, employment, social interactions, etc.  Vulnerable – sometimes or periodically has acute or chronic disability affecting housing, employment, social interactions, etc.  Safe – rarely has acute or chronic disability affecting housing, employment, social interactions, etc.  Building Capacity – disability controlled by services or medication  Thriving</p>	<p>For coaches and counselors, working with individual clients to document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client's ability to maintain a certain level of functioning. For clients who want guidance in looking at their own strengths and areas for improvement as they work toward independence from public assistance.</p>
<p>Housing, Employment, Credit, Income, Debt, Food, Childcare, Savings, Consumer Protection, Children's Education, Adult Education, Health Care Coverage, Life Skills, Family Social Relationships, Mobility, Community Involvement, Parenting Skills, Legal, Mental Health, Substance Abuse</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>Write in Valid Credit Score</p>	<p>Provide the coach/counselor with necessary information to ascertain the financial awareness already possessed by the consumer; Track changes in this level of awareness to evaluate program effectiveness</p>
<p>Free text field for client goal</p>	<p>Provide the coach/counselor with an understanding of the consumer's existing ability to meet goals</p>
<p>Free text field for activities to be completed by n</p>	<p>Provide the coach/counselor with an understanding of the consumer's existing ability to meet goals</p>
<p>date value: MM-DD-YYYY</p>	<p>Provide the coach/counselor with an understanding of the consumer's existing ability to meet goals</p>
<p>Write in Achieved Goal</p>	<p>Provide the coach/counselor with an understanding of the consumer's existing ability to meet goals</p>
<p>(Enter a percentage (20%, 30%, etc)</p>	<p>Provide the coach/counselor with an understanding of the consumer's existing ability to meet goals</p>





Standard Intake Coaching Question	National Coaching Programs such as NeighborWorks, The Financial Clinic, NY, \$tand By Me, DE, Cities for Financial Empowerment (CFE), University of Wisconsin, Center on Financial Coaching Services, CFED, National Disability Institute,
FDIC	
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FDIC	
Standard Intake Coaching Question	Yes. NDI included Access Assistive Technology Loan Fund. For people with disabilities this is a common loan category not reflected on national financial capabiltiy surveys.
Standard Intake Coaching Question	National Coaching Programs such as NeighborWorks, The Financial Clinic, NY, \$tand By Me, DE, Cities for Financial Empowerment (CFE), University of Wisconsin, Center on Financial Coaching Services, CFED, National Disability Institute,
FINRA	YES Added timeframe and examples for savings.
FINRA	YES Added examples for savings.
FINRA	YES Added examples.

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Social Solutions	
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Standard Intake Coaching Question	National Coaching Programs such as NeighborWorks, The Financial Clinic, NY, \$tand By Me, DE, Cities for Financial Empowerment (CFE), University of Wisconsin, Center on Financial Coaching Services, CFED, National Disability Institute,

Standard Intake Coaching Question	
Standard Intake Coaching Question	Yes. NDI. Many people with disabilities are faced with expenses specific to their disability that require planning and savings.
Standard Intake Coaching Question	National Coaching Programs such as NeighborWorks, The Financial Clinic, NY, \$tand By Me, DE, Cities for Financial Empowerment (CFE), University of Wisconsin, Center on Financial Coaching Services, CFED, National Disability Institute,
Sandard Intake Coaching Question	National Coaching Programs such as NeighborWorks, The Financial Clinic, NY, \$tand By Me, DE, Cities for Financial Empowerment (CFE), University of Wisconsin, Center on Financial Coaching Services, CFED, National Disability Institute,
Standard Intake Coaching Questions	Yes. NDI added in Access Assistive Technology Loan Fund.
Sandard Intake Coaching Question	National Coaching Programs such as NeighborWorks, The Financial Clinic, NY, \$tand By Me, DE, Cities for Financial Empowerment (CFE), University of Wisconsin, Center on Financial Coaching Services, CFED, National Disability Institute,

Arizona Self-Sufficiency Matrix	<a href="http://www.ctagroup.org/wp-content/uploads/SSM">http://www.ctagroup.org/wp-content/uploads/SSM</a>
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