



## Sacramento Financial Empowerment Center

*Free One-on-One  
Financial Counseling*

### **INSTRUCTIONS FOR SCHEDULING AN APPOINTMENT USING BOOKINGS**

**STEP 1** – Open up [THIS LINK](#).

**STEP 2** – Select the kind of appointment you are needing.

There are four types of appointments available:

- The first appointment using video conferencing (Online using Microsoft Teams)
- The first appointment over the phone
- Follow up sessions using video conferencing (Online using Microsoft Teams)
- Follow up sessions over the phone

You will see a total of 8 possible selections as all appointments described above are also offered in Spanish.

Click on the appointment type that you want (see graphic next page).



# Sacramento Financial Empowerment Center (ONLY available to Sacramento residents 18yo+)

## Select service

First Appointment (Online using Micro... 1 hour Free	First Appointment (Phone Call) 1 hour Free
Follow Up Session (Online using Micro... 30 minutes Free	Follow Up Session (Phone Call) 30 minutes Free
Primera Cita (En línea usando Microso... 1 hour Free	Primera Cita (Teléfono) 1 hour Free
Proxima Cita (En línea usando Microso... 30 minutes Free	Proxima Cita (Teléfono) 30 minutes Free

**PLEASE NOTE:** We especially encourage first time appointments to select the 'Online using Microsoft Teams' option (as in the example above). But if you do not feel comfortable with being on screen or do not have a smart phone with a strong signal or a PC with camera and good wi-fi, a phone call is perfectly acceptable.

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\*\*\*\*\*For those selecting a **first-time appointment** (*for follow up sessions, please skip to “For those selecting a follow-up appointment...” after this section*).

**STEP 3** – Select a desired **date** and then select the **time** that works best with your schedule.

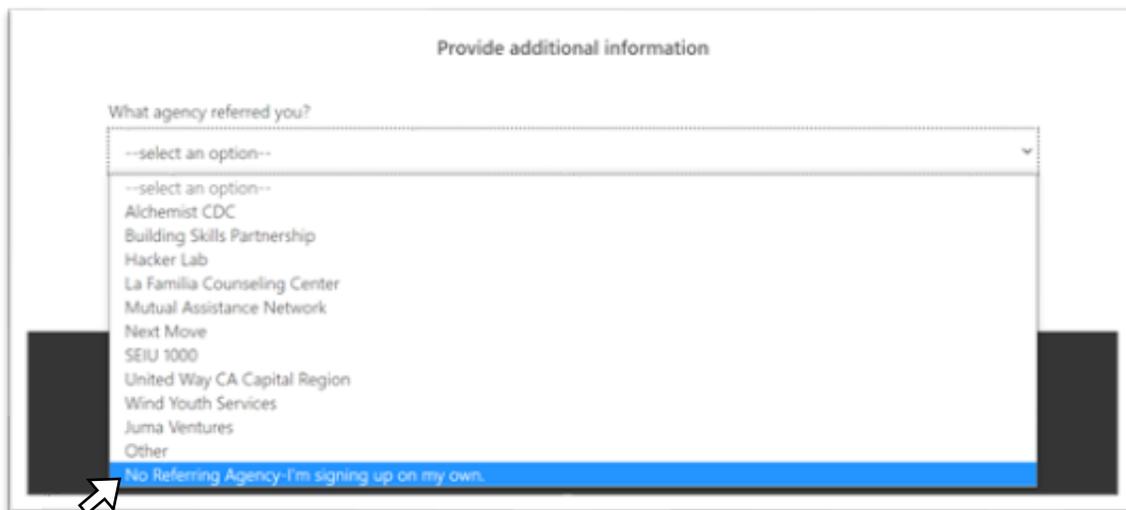
The screenshot shows a date and time selection interface. At the top, it says "February 10, 10:00 am". Below this is a calendar for February 2022. The date "10" is highlighted with a dark blue circle and a white arrow pointing to it. To the right of the calendar is a time selection grid. The time "10:00 am" is highlighted with a dark blue box and a white arrow pointing to it. Other times shown include 9:00 am, 11:00 am, 12:00 pm, and 1:00 pm. At the bottom, there is a note: "All times are in (UTC-08:00) Pacific Time (US & Canada)".

**STEP 4** – Enter in your **full name, email address, address** and **phone number**. Please double check these for accuracy. You may also enter notes on the financial challenges and goals you would like to address.

The screenshot shows a form titled "Add your details". On the left side, there are four input fields: "Name", "Email", "Address (optional)", and "Select country code" (with a dropdown arrow) followed by "Phone number". On the right side, there is a text area labeled "Notes (optional)". Above the notes area, there is a prompt: "Please let us know if you have any special requests. Thank you."

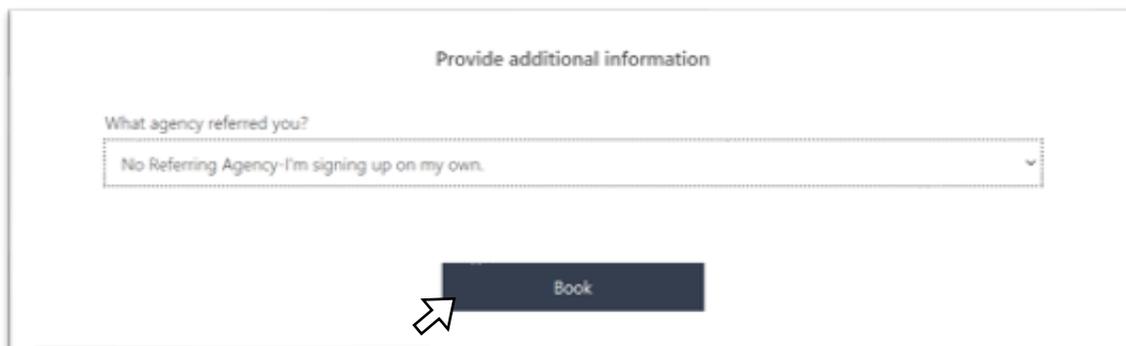
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**STEP 5** – Select the agency that referred you from the available drop-down list. If the agency that referred you is not visible in the list, select “other” OR if you are booking a session on your own, select “No referring agency-I am signing up on my own” (as in the example below).



The screenshot shows a form titled "Provide additional information". Below the title is a question: "What agency referred you?". A dropdown menu is open, displaying a list of agencies: "--select an option--", "--select an option--", Alchemist CDC, Building Skills Partnership, Hacker Lab, La Familia Counseling Center, Mutual Assistance Network, Next Move, SEIU 1000, United Way CA Capital Region, Wind Youth Services, Juma Ventures, Other, and "No Referring Agency-I'm signing up on my own.". The last option is highlighted in blue, and a white mouse cursor arrow points to it.

**STEP 6** – Then click on “Book” to complete scheduling your session.



The screenshot shows the same form as in Step 5, but the dropdown menu is now closed. The selected option, "No Referring Agency-I'm signing up on my own.", is visible in the dropdown box. Below the form is a dark blue button labeled "Book". A white mouse cursor arrow points to the "Book" button.

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**For those needing to schedule a follow-up appointment...**

**STEP 1 AND 2** – See page 1 above.

**STEP 3** – *First*, click on the drop-down menu for “Select Staff” (even though it says “optional”) and select the name of the financial coach that you met with in your first session. *Then*, select the date and time that your financial coach is available that works with your schedule.

The screenshot shows a scheduling interface titled "February 23, 3:00 pm with Marcia McClain". On the left is a calendar for February 2022 with the 23rd highlighted. On the right, there is a "Select staff (optional)" dropdown menu with "Marcia McClain" selected. Below the staff selection are two time selection buttons: "2:30 pm" and "3:00 pm", with "3:00 pm" being the selected option. At the bottom, there is a note: "All times are in (UTC-08:00) Pacific Time (US & Canada)".

**STEP 4** – Enter your **full name, email address, address and phone number**. Please double check these for accuracy. You may also enter notes on the financial challenges and goals you would like to address.

The screenshot shows a form titled "Add your details". It contains several input fields: "Name", "Email", "Address (optional)", "Select country code" (a dropdown menu), and "Phone number". To the right of these fields is a text area labeled "Notes (optional)" with the prompt "Please let us know if you have any special requests. Thank you."

**STEP 5** – Then click on “Book” to schedule your session.

Should you have any questions about this process or requires some assistance, please contact the Sacramento Financial Empowerment Center at either [FEC@cityofsacramento.org](mailto:FEC@cityofsacramento.org) OR call 916-808-4927.