Sacramento Financial Empowerment Center

Free One-on-One Financial Counseling

INSTUCTIONS FOR SCHEDULING AN APPOINTMENT USING BOOKINGS

STEP 1 – Open up THIS LINK.

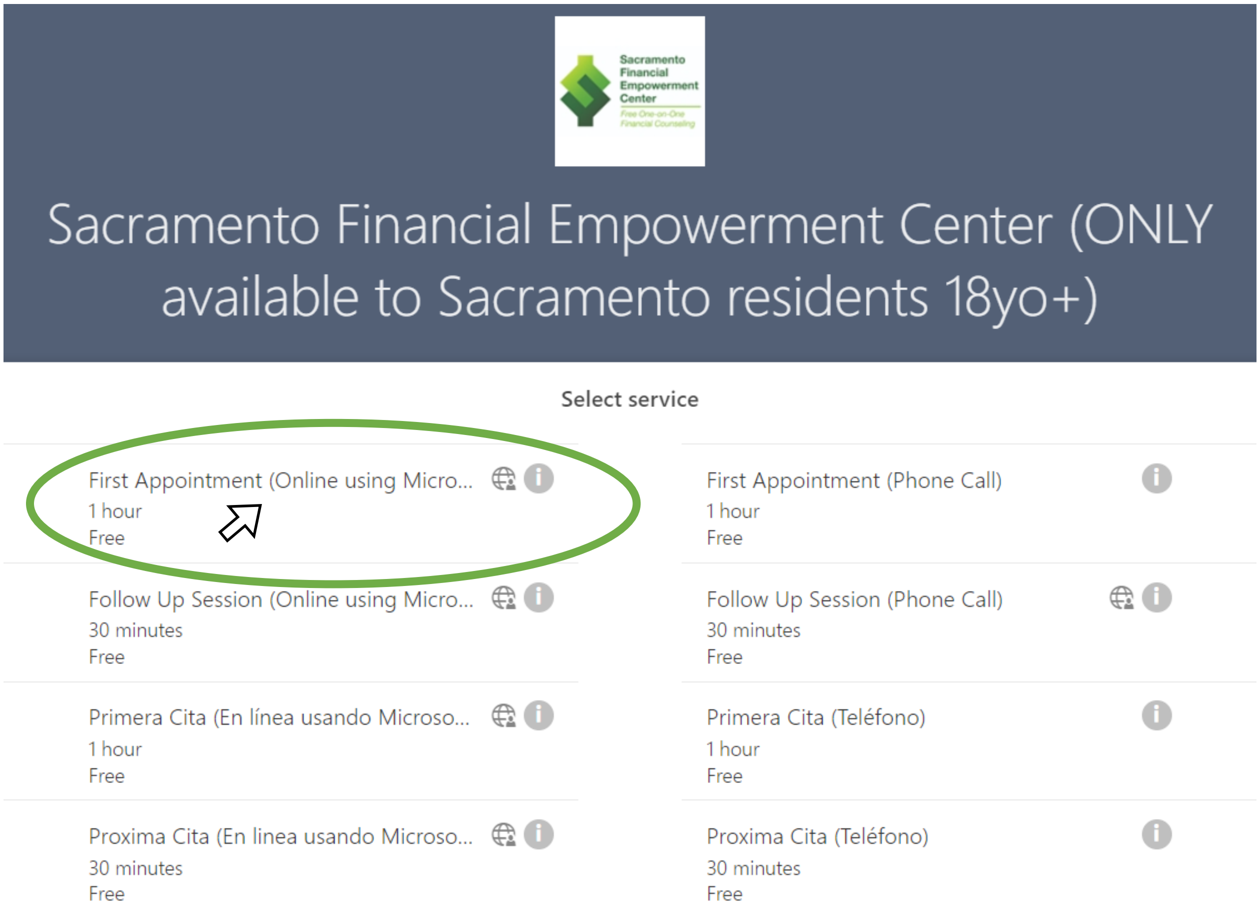
STEP 2 – Select the kind of appointment you are needing.

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).



<u>PLEASE NOTE:</u> 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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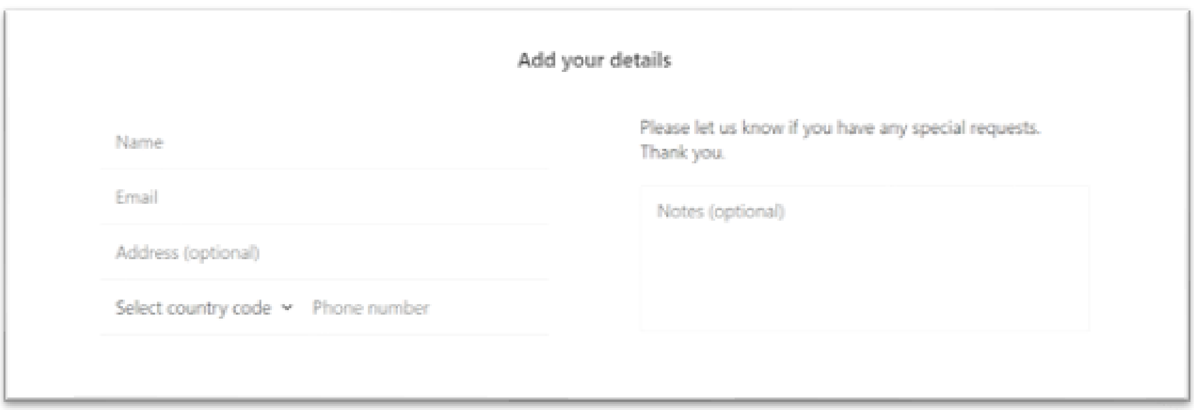
*****For those selecting a <u>first-time appointment</u> *(for <u>follow up sessions</u>, please skip to "For those selecting a <u>follow-up appointment</u>…" after this section)*.

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

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



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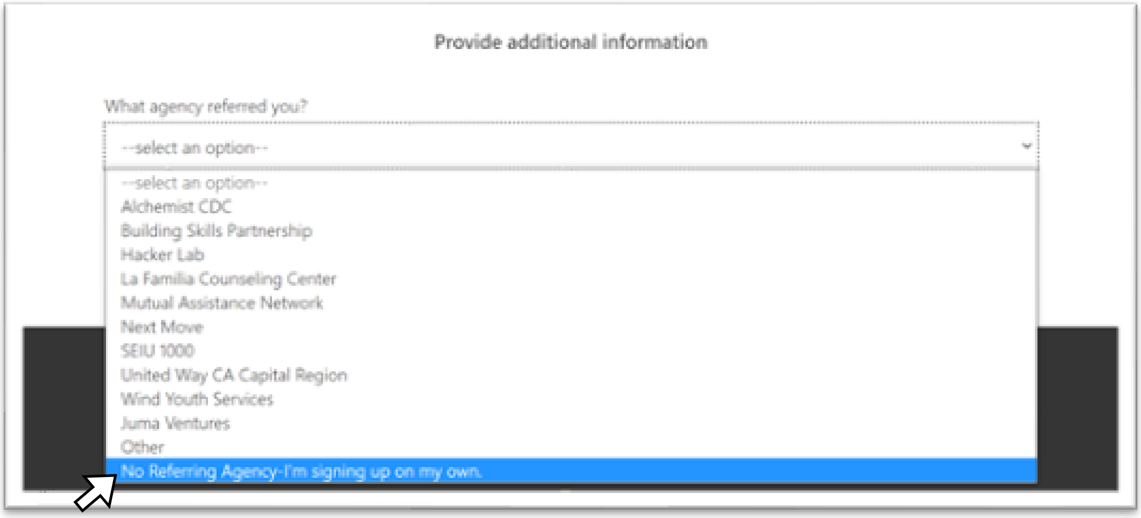
STEP 5 – Select the agency that referred you from the available drop-down list. If the agency that referred you is not visible in the list, select “other” OR if you are booking a session on your own, select “No referring agency-I am signing up on my own” (as in the example below).



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

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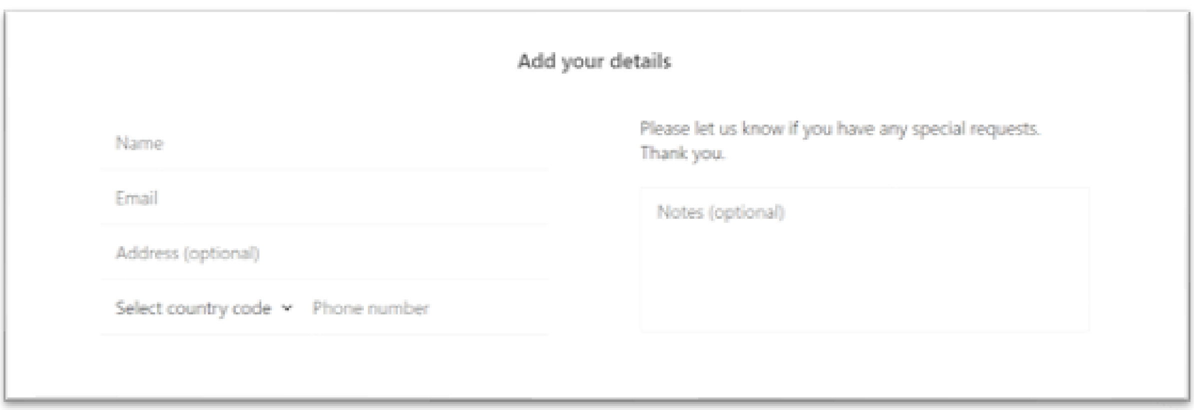
For those needing to schedule a <u>follow-up appointment</u>...

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.

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



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 OR call 916-808-4927.