Coordinated Assistance Network (CAN)
Quick-Start Guide

Getting Started with the Coordinated Assistance Network (CAN)

Thank you for your interest in volunteering with the Coordinated Assistance Network. Below are some resources to help you sign up and engage with pro bono clients, including user-friendly steps, video tutorials, and frequently asked questions.

To register, watch a quick **video tutorial**:

OR follow the steps below:

- Go to **www.canportal.org** → Apply → Counselors/CFPs ***OR*** **www.canportal.org/counselors**
- Click 'Sign up Now' **www.portal.canportal.org/join/counselor**
- Complete and submit your contact information and note the following to be affiliated with FFP's program:

  1. **What Type(s) of Counseling do you provide?**
     - *Certified Financial Planner (and provide CFP Board ID in the field to the right)*
  2. **I Have Been Certified/Accredited By (or am Affiliated With)**
     - *Foundation for Financial Planning*

- You will be directed to the CAN HIPAA privacy policy for your signature within the 'My certification Documents' tab.
- From the dashboard, select 'browse opportunities' and 'apply' next to the Foundation for Financial Planning opportunity.

For additional help navigating the Coordinated Assistance Network, please visit **FFPprobono.org/CAN**.

- Once accepted into the program (usually within 24-48 hours) you'll receive a 'validated badge' and be able to see 'Foundation for Financial Planning' at the top of your dashboard. You'll click on the 'Foundation for Financial Planning' to see your cases (clients). This is where new cases will be provided to you. You will not be assigned cases until you apply for the FFP Posting in the browse opportunity section.

- Please go back to the 'My Documents/Certifications' tab to complete FFP's Letter of engagement which will apply to all future clients engaged within the CAN Portal.

- You will receive an email when a new case has been assigned to you.

Navigating the CAN Portal to Help Your Clients

Watch a quick **video tutorial**:

OR follow the steps below:

- Go to File Management to see a list of your clients. By clicking on a client's name, you enter their 'file.'

- Scroll down to 'File Details' to learn about the client. 'File Details' has multiple tabs you can explore to learn about the client or to access materials to support the engagement. In a client's file, you an also accept them as a client and change the status of the engagement.

- Use the 'Support' link at the bottom of the far left dashboard menu if you need guidance with the functionality of the system or have questions about how to change the status of the engagement or reach out to **rroth@FFPprobono.org** and **jtobias@FFPprobono.org**.

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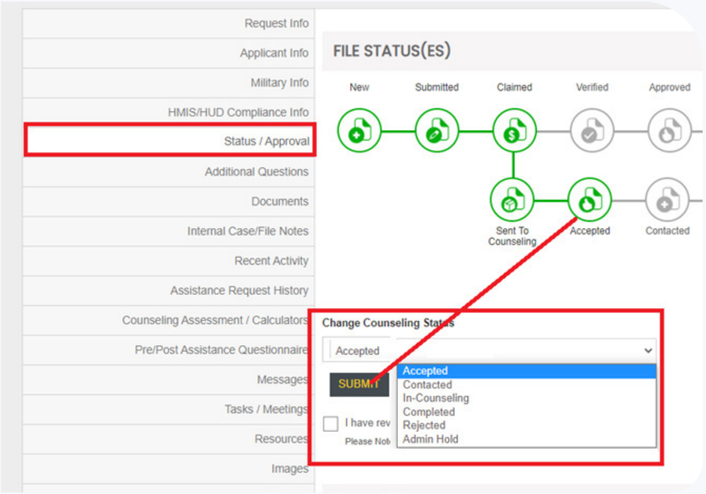
VERY IMPORTANT:
Use the 'Quick View Profile' at the top of the client's case file to change the status of the engagement from 'Accepted' to 'Contacted' and so on until you get to 'Completed'. This helps FFP and CAN monitor your engagements and manage the flow of clients. Please note that advisors are encouraged to prompt the client to ask questions over email if they are unable to reach them by phone. This is acceptable for moving the engagement to 'completed' status.



Tips for Minimizing Client Unresponsiveness and No-Shows

While unresponsive clients and no-shows can be frustrating, our volunteers find that pro bono military counseling can be deeply rewarding. **It is important to be patient and understanding as many pro bono clients experience a range of issues** that impede their ability to make pro bono financial planning a priority.

We encourage you to **reach out to your pro bono client immediately after being matched** and to schedule a counseling session within two weeks. If your client is unresponsive after **two phone call attempts with voicemails, one text message, and one email** to a client, please change the status of your case to admin hold.

Many volunteers find that **texting is a great way to introduce themselves and schedule meetings** as pro bono clients are more likely to respond to texts than phone calls. Others find that some pro bono clients prefer to engage over email so if you cannot reach your client on the phone, **please prompt them to email you** some questions that you can respond to.

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Frequently Asked Questions

- ***How do I close out a file after working with a client?*** After working with a client, go to the Checklist Tab to indicate the topics discussed during your session, and then the Pre/Post Survey Tab to send the post-assistance survey to your client. Lastly, please visit the Status Tab to change the status of the engagement to 'completed.'

- ***What if my client is unresponsive?*** If at any time during the process, the client is not responsive, change the Status of the case to Admin Hold, and select the reason from our list. This will send a message to the program leadership and move it to your Closed Files Table automatically.

- ***How many attempts should I make before deeming a client unresponsive?*** Please attempt two phone calls (with voicemails), one text message, and one email to set up a counseling session with your client. We encourage you to reach out to your pro bono client immediately after being matched and to schedule a counseling session within two weeks. As you complete these attempts, indicate them by making a note of each attempt on the Notes tab. Check out this CAN video for more information on taking notes in your account: **Coordinated Assistance Network (CAN) File Management Notes – YouTube**

- ***What if an unresponsive client reaches out to me?*** If the client reaches back out to you at a later date and you wish to complete the counseling session, simply open the file from the Closed Files table and change the status to active (like contacted, or In-Counseling).

- ***How do I stop receiving new clients, or increase or decrease the number of clients assigned to me?*** You can take a break from receiving new clients by clicking the green status bubble on the graph for FFP on your dashboard. This will prompt you to indicate a date that you wish to begin receiving clients again (if you have active files, you will be able to choose either to finish those engagements or send them back for reassignment). If you wish to increase or decrease your client load, you can contact CAN's Client Manager, Steve Stout (**sstout@veteransplus.org**), to let him know your preference.

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