

Approaching Retirement Federal Resource Guide Pilot: Observation Checklist

Instructions to Observer

You will be observing a counseling session in which the *Approaching Retirement Federal Resource Guide* could be used with the client. Your role is to observe the session and use the checklist below to note how the *Federal Resource Guide* is used.

Use the checklist below to identify how the *Federal Resource Guide* was used in the session you observed. You can also make notes to the right of the checklist item or in the open text field at the bottom of the checklist to further elaborate on your response.

Please note the following statement regarding this collection.

Public Burden Statement: According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number (OMB 0985-0080). Public reporting burden for this collection of information is estimated to average 30 minutes per response, including time for gathering and maintaining the data needed and completing and reviewing the collection of information. The obligation to respond to this collection is voluntary.

Introduction to Client & Counselor

Please read/ask the following before beginning the observation:

My observation today is part of a data collection that has been approved by the Office of Management and Budget (OMB). The OMB Control Number for this survey is 0985-0080. If you would like to comment on this data collection or confirm that this is a valid collection, please contact Maggie Flowers at ACL at 202-795-7315.

To client: *Are you comfortable with me observing the counseling session today in support of this data collection?*

To counselor: *Are you comfortable with me observing the counseling session today in support of this data collection?*

Do you have any questions for me before we begin the session?



Checklist

Checklist Item	Notes
<input type="checkbox"/> The counselor used the <i>Federal Resource Guide</i> with the client in this session.	
<input type="checkbox"/> The counselor was able to meet the needs of the client using the <i>Federal Resource Guide</i> .	
<input type="checkbox"/> The following modules of the <i>Federal Resource Guide</i> were used in the session: <ul style="list-style-type: none"><input type="checkbox"/> Debt and Loans<input type="checkbox"/> Food Resources<input type="checkbox"/> Health Care<input type="checkbox"/> Housing Assistance for Homeowners<input type="checkbox"/> Housing Assistance for Renters<input type="checkbox"/> Social Security<input type="checkbox"/> Taxes	
<input type="checkbox"/> The <i>Federal Resource Guide</i> was written in the appropriate language for the client.	
<input type="checkbox"/> The <i>Federal Resource Guide</i> helped the client leave the session with clear next steps.	
<input type="checkbox"/> There was a missed opportunity for the counselor to use the <i>Federal Resource Guide</i> for this/these topic(s): _____	

Key Takeaways / Additional Notes:

