

## MONEY 101 EDUCATION

111.00 How to review your client's response to the Money 101 Education getting-to-know you Survey

New Money 101 Educations clients should all take the Getting-To-Know-You survey, so that you can assess their financial literacy before the first interview.



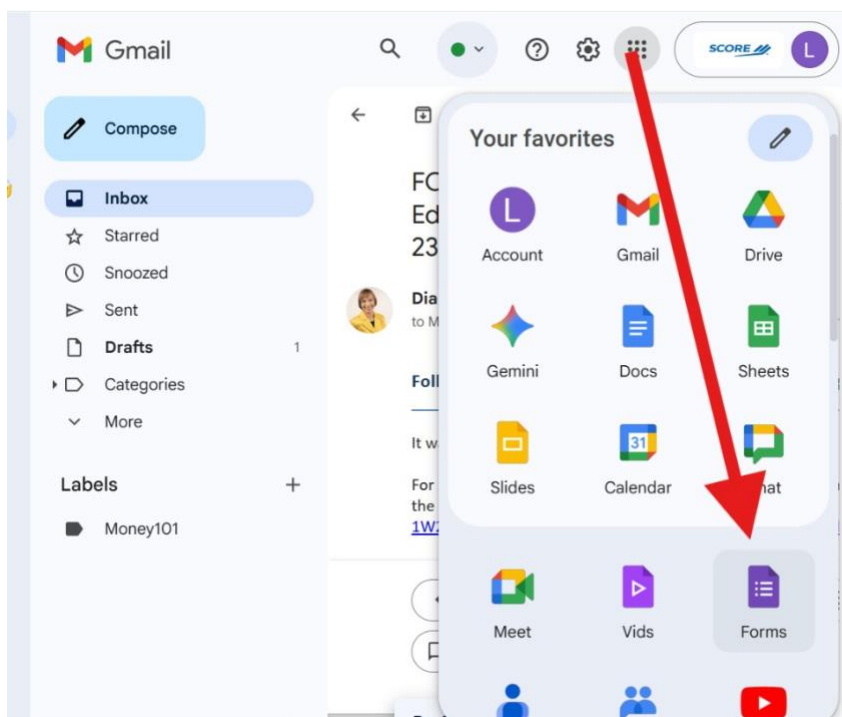
Thus, in your first outreach email send them the link to the survey:

<https://forms.gle/ofB85jpcVduH2ukDA>

Also, give them a deadline for the survey's return, usually a few days before you meet so that you can review the results.

To check if they completed the survey and REVIEW THE RESULTS

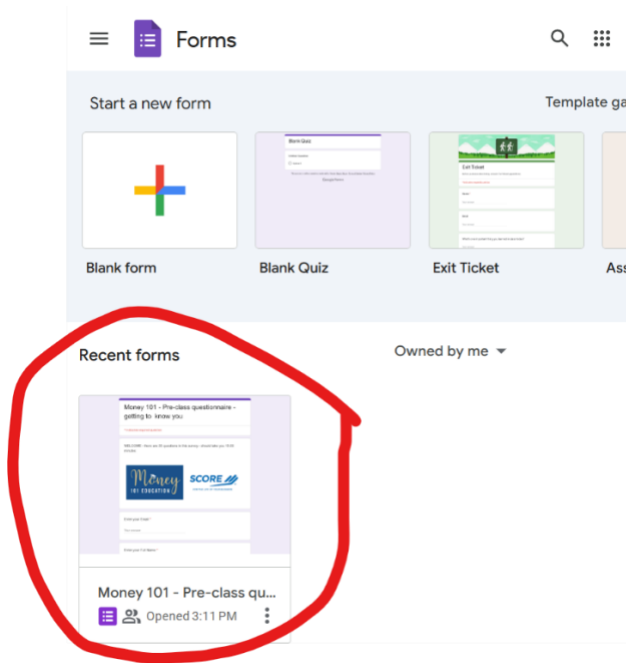
1. From your SCORE EMAIL, press the nine dots in the upper right-hand corner - this brings up the list of Gmail Apps.
2. CLICK FORMS



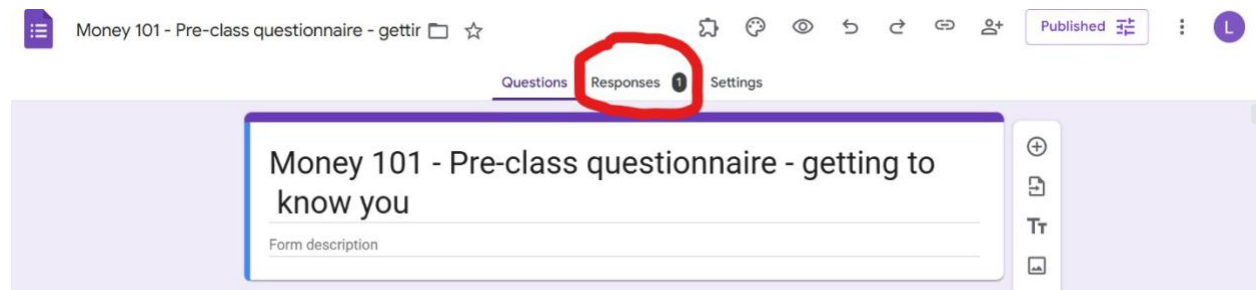
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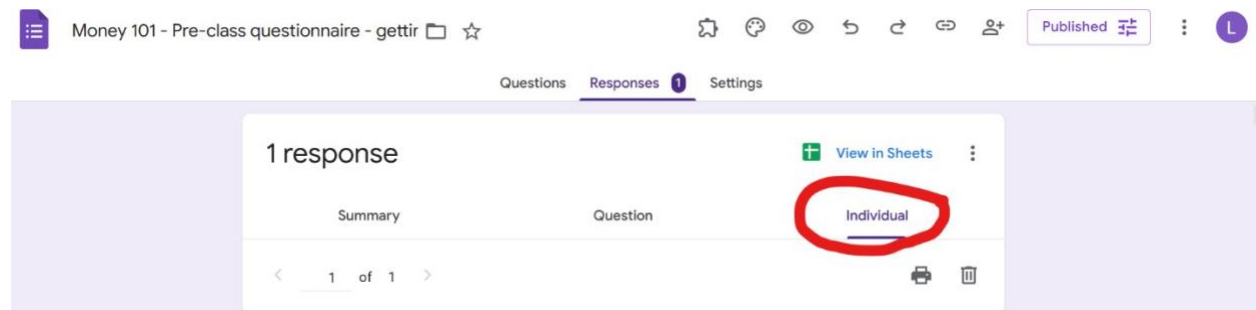
3. Select the form that says:  
"MONEY 101 - Pre-class questionnaire - getting to know you"



4. This will bring you to the survey - it may open with "Questions", but on the top of the page CLICK so that it brings you to the "Responses" page:



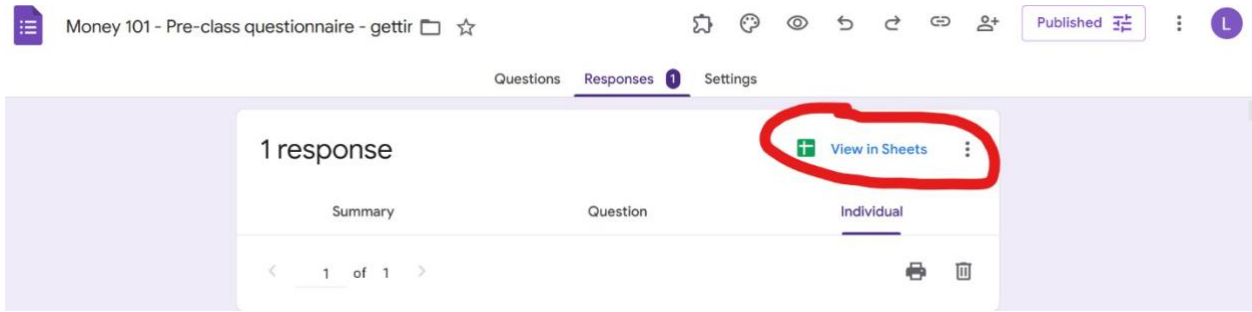
5. Select Individual to look at specific responses:



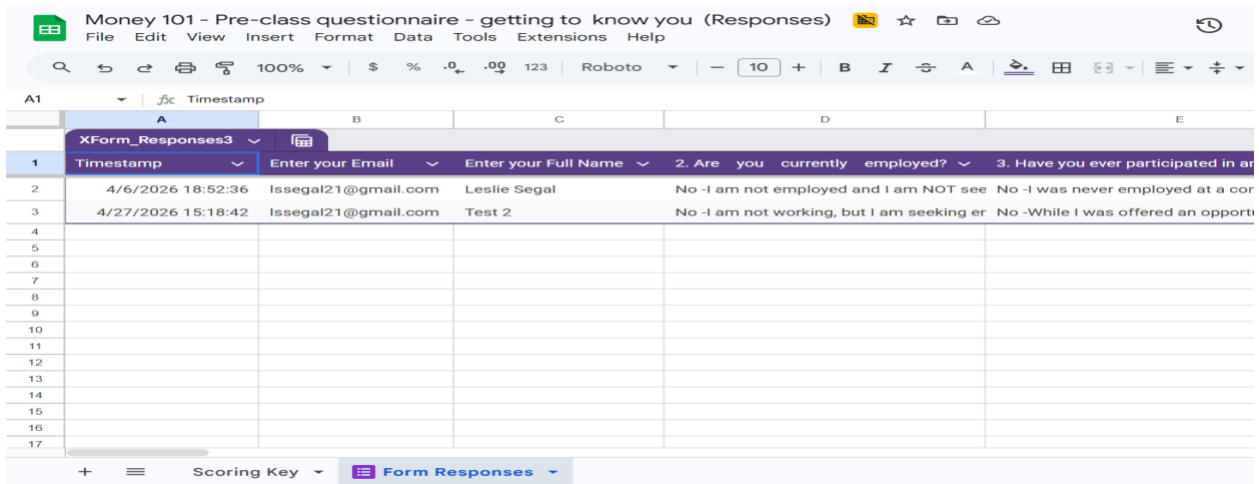
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6. Or CLICK on Sheets to look at the responses and scores from all respondents:



The sheets will come up with the responses in a row:



Scroll over to see the answers and to column AL for the total score:

