Intake Registration

Purpose:

- This is a registration form that captures participants' contact information and their self-identified needs and wants.

When to use it:

- If you do not already have a generic registration form for participants, you can use this tool to capture basic contact information and set up a participant number.

- This form is administered by staff who deliver financial literacy education and it is filled out by participants at the beginning a course.

Description:

- This form provides a way to keep track of the people who access financial literacy education at your organization.

- It can assist your organization to:
  - document referral sources
  - assess financial literacy needs and interests
  - identify required 'supports to participation' (e.g. child minding, interpretation etc.)

How to use it:

- Feel free to choose (and add) questions that support your programs' administrative needs.

- Do not collect information that you do not plan to use in some way.

- Assign a participant number and set up a confidential list of participant names and numbers. You can establish participant numbers in a way that labels their entry date or course group and also provides a unique number for the particular participant (e.g. Course group – client number: 023-124)

- Collect the forms and ensure that they are complete.

1 *Please refer to the Office of the Privacy Commissioner of Canada's recent changes to the Personal Information Protection and Electronic Documents Act (PIPEDA):* http://www.priv.gc.ca/leg_c/leg_c_p_e.cfm

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