

## **FAQ FOR THE FINANCIAL OFFICER CLINIC**

### **So, is this a workshop?**

No, this is **not** a workshop. This is a new thing from Education, and we're excited about it! It is a **clinic**, where a local's secretary-treasurer or trustee can get an hour of one-on-one time with an experienced member facilitator or staff about a specific problem.

### **Is there a pre-requisite?**

Yes. Ideally, the secretary-treasurer or trustee should have already taken some union education. The clinic is meant to assist with a specific problem and is not an orientation to the role of financial officer. New financial officers should sign up for the 3-hour online Treasurer Orientation or Trustee Orientation.

### **Can the local just drop in?**

No. The local must book an appointment, via Calendly, for their one-on-one time with the facilitator. When the local chooses their appointment time, Calendly will prompt them to provide details of their particular financial issue. This will allow the facilitator to prepare for the appointment.

### **Wait - We're not using MRM-ED/CUPE website for registration?**

Exceptionally, we're not using MRM for registration, but Calendly.

### **What is Calendly?**

Calendly is a free, safe third-party online app that will allow locals to pick a time that best suits them. They will receive a confirmation email from Calendly. Education also gets notified when they schedule. A reminder email with a Zoom link will follow two-days before their appointment. This app reduces the back and forth of phone calls and emails when trying to set up appointments; there's no risk of double-booking because once a spot is gone, it is no longer available to be seen or booked.

### **So, this is virtual...**

Yep! The one-on-one sessions will be done online using Zoom.

### **How will they get the Zoom link?**

The Zoom link will be sent out separately two days before their appointment. There is no registration or log in required to use Zoom.

### **What will the financial officers need for this clinic?**

Their books (ledger) and files, details about their issue, a copy of the Financial Officer's Handbook (if they have one) and a computer or tablet from which they will be able to share their screen and data about their issue. A webcam is not necessary but could be helpful. Joining from a smart phone will present challenges and is not recommended.

### **The member said they never got a confirmation email from Calendly.**

Have them check the spam or junk mail sections of their email. The confirmation email is sent out immediately and should arrive in their inboxes within a minute or two.