



Introduction to Touchpoint Curriculum

Version 2.0

Instructor Guide

I. COURSE ORGANIZATION AND OUTLINE

The *Introduction to Touchpoint Curriculum* course is **organized into seven parts**:

1. Introduction and Agenda
2. What Are Touchpoints?
3. Why Do We Have Touchpoints?
4. Navy-specific Requirements
5. Training Completion Options
6. Touchpoint Examples
7. Resources

TOTAL: 30 minutes

II. LEARNING OBJECTIVES

Terminal Learning Objectives (TLOs)




- Be familiar with the Touchpoints identified in the Department of Defense Instruction (DoDI) 1322.34.
- Be familiar with the Touchpoint resources.
- Demonstrate proficiency using Touchpoint Checklists and Handouts, videos and Video Discussion Guides, and PowerPoint (PPT) Slides and Instructor Guides.
- Demonstrate proficiency with skills learned in previous sessions to include financial counseling, mechanics of the FPW/eFPW, and instructional techniques.
- Understand how financial literacy training requirements are tracked.

III. CHAPTER PREPARATION

This is an administrative chapter designed to provide an overview of the Touchpoint Curriculum. The CFS will not teach this chapter during the CFS course. Remind students that they can use the PowerPoint slides and Instructor Guide to provide an overview to their command, including leadership, who may be unaware of the purpose and requirements of the Touchpoint Curriculum.

Sections labeled “**INSTRUCTOR NOTE:**” include additional information for instructor background, as well as activities that provide practical application of key learning points. Instructor notes contain an icon and appear in a shaded text box for easier recognition.

CONTENT ICONS — The following icons are used throughout the guide:

<div>INSTRUCTOR NOTE:</div> <div>  </div>	<p>Instructor Note – (indicates additional information related to the content for the instructor)</p> <p>Checklist and Handout – (indicates a checklist or handout is associated with the content)</p> <p>Learning Activity – (indicates a learning activity)</p> <p>Video – (indicates an optional video)</p>
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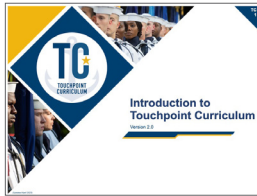
INSTRUCTOR NOTE: Being prepared for training promotes organization, projects a positive image, and reduces stress.

Be prepared to discuss the checklist and handouts in class. You should familiarize yourself with this content so you can effectively discuss each document during your presentation.

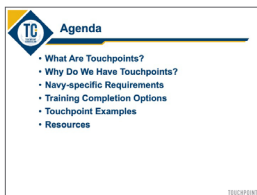
While this guide is written as a script, avoid reading it word-for-word. Familiarize yourself ahead of time so you feel comfortable covering the material in your own words. An in-depth review of each handout is not required but you are encouraged to manage time, course work, and audience interest during instruction.

Throughout the presentation, the checklist and handouts will be identified with an icon on the PowerPoint and an Instructor Note in this Instructor Guide.

IV. CONTENT



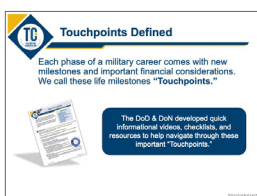
SLIDE 1



SLIDE 2



SLIDE 3



SLIDE 4

Introduction to Touchpoint Curriculum

Welcome to your Introduction to Touchpoint Curriculum. My name is _____ and I'm excited to share with you today how this training will help you, as a Command Financial Specialist (CFS), have a discussion with personnel within your command for the purpose and process concerning Touchpoint requirements. Let's get started.

Agenda

Over the next 30 minutes, we'll discuss the Touchpoint Curriculum and how you'll use it as a CFS. By the end of the presentation, you should have an understanding of each of the identified milestones (called Touchpoints), ways to satisfy training requirements, and resources available to not only CFS but Service members as well.

What Are Touchpoints?

Before attending the CFS course, you might have asked yourself, "What are Touchpoints?" We will discuss the purpose of the Touchpoint Curriculum and identify each unique financial milestone you will encounter throughout a Service member's military career.

Touchpoints Defined

Why does the DoD care about your financial situation? Service members have primary responsibility for maintaining their financial readiness. Financial readiness is a state in which successful management of personal financial responsibilities supports a Service member's ability to perform his or her responsibilities. Lack of financial readiness can have negative impacts on mission readiness and the Department's ability to carry out its responsibilities in support of the national defense strategy. Financial readiness impacts mission readiness.



SLIDE 5

Road to Financial Readiness

As a CFS, it's important for you to understand each of these Touchpoints so you can deliver the right training at the right time to Service members.

Think of your financial journey as a road trip. Where are you now? Where do you want to be? How will you get from here to there? As with most successful journeys, you'll need to chart your course and make a plan. You'll also need regular fill-ups and tune-ups along the way. Quite likely, even some course corrections or detours will be required.

Touchpoint Curriculum is like a pit stop on the road to financial readiness that allows Service members to pull off the road to get the help they need when they need it. As a CFS, you lead the pit crew. But your Personal Financial Managers (PFMs) are always here to help!

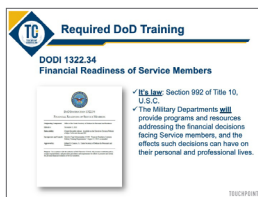
There are 13 Touchpoints identified and illustrated on this Road to Financial Readiness graphic. Each of these personal or professional milestones come with a lot of financial considerations and decisions.



SLIDE 6

Why Do We Have Touchpoints?

Now that we have discussed what Touchpoints are, let's talk about why the DoD and Navy require personal financial readiness training.



SLIDE 7

Required DoD Training

Title 10, Section 992 of the United States Code identifies financial education as important and mandatory for Service members. The purpose of DoD Instruction 1322.34 is to establish policy, and prescribe procedures and requirements to promote and sustain the personal financial readiness of Service members. It requires each military service to provide mandatory resources addressing financial decisions facing Service members, and the effects these decisions can have on their personal and professional lives.



SLIDE 8

Navy-specific Requirements

Now that we covered the “what” and “why” of the Touchpoints, let’s discuss the steps Sailors must take to ensure their training is complete and documented.



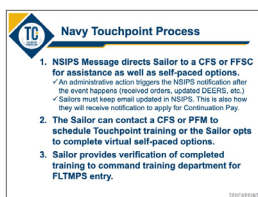
SLIDE 9

Navy Regulations

The Navy publishes yearly training NAVADMIN in official message traffic outlining the specific requirements for annual and general military training. The NAVADMIN directs Sailors that Touchpoint completion is:

- Mandatory at personal and professional touchpoints across the military life cycle
- Offered as virtual or in-person training, depending on the command depending on the command’s mission requirements

Virtual courses are available on Navy e-Learning and the MyNavy Financial Literacy mobile app. In-person training is available at the Fleet and Family Support Center (FFSC) by the installation’s PFM. CFS and Navy Reserve Center-assigned Personal Financial Counselors (PFC) may also provide in-person training. Flexible course offerings, depending on mission requirements, expands the opportunity for Sailors to complete and document this required training.



SLIDE 10

Navy Touchpoint Process

You might be asking yourself how the Navy identifies those who require the training and how completion of training is tracked. The following steps outline the process when a Sailor enters their specific Touchpoint window:

1. The Sailor triggers an administrative action with their personnel record (NSIPS) such as receiving orders, adding/removing a dependent in DEERS, etc.
 - a. A message is generated through NSIPS and directs the Sailor to contact their CFS, PFM, or FFSC for in-person assistance and outlines how they can complete training via the virtual options.
 - b. Please note: Remind Sailors to keep their email address up to date in NSIPS. This is also how they will receive notification to apply for Continuation Pay.
2. The Sailor can contact a CFS or PFM to schedule in-person Touchpoint training or the Sailor can opt to complete virtual, self-paced Touchpoint training.
3. When the Sailor completes training with a CFS or PFM, they will take a copy of the completed and signed checklist to their command's training department for entry into their FLTMPs account.
 - a. Please note that Sailors who elect to complete the training via the MyNavy Financial Literacy mobile app will also need to provide a copy of their training completion to their training departments.
4. Sailors who chose to complete the training via the Navy e-Learning portal will not need to provide a completion certificate to their training department. The Navy e-Learning portal will automatically document the training completion.

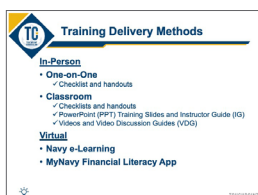
It is important for you as a CFS to get and stay connected with Career Counselors, administrative LPOs, and training departments. These are key partners to help ensure Touchpoint training is delivered and recorded.



SLIDE 11

Training Completion Options

Now that we explained the Navy's specific Touchpoint requirements and processes, let's dive into the options available to those who need to complete their training.



SLIDE 12

Training Delivery Methods



ACTIVITY: Refer learners to the FINRED Navy Resource Touchpoint landing page and demonstrate how CFS can download the latest video discussion guides, instructor guides, videos, checklists for both counselor and counselee, and corresponding handouts.

There are different ways you can teach the Touchpoint Curriculum. You decide which one best fits the needs of your client, your knowledge and familiarity of the topic, and the resources available to you. You can provide in-person training or you can refer them to the virtual training options.

When delivering in-person training, you or your client may prefer to discuss their situation as it relates to the specific Touchpoint one-on-one with you, a CFS, or the Personal Financial Manager (PFM) at the Fleet and Family Support Center (FFSC).

With each of these in-person options, you as the instructor have the tools and delivery options to ensure the training is impactful.

One-on-One

- Checklists and handouts

Classroom

- Checklists and handouts
- PowerPoint (PPT) Training Slides and Instructor Guide (IG)
- Videos and Video Discussion Guides (VDG)

Virtual

- Navy e-Learning
- MyNavy Financial Literacy mobile app

Sailors choosing to complete the virtual Touchpoint training can visit the Navy's e-Learning portal or complete the Touchpoint modules via the

free MyNavy Financial Literacy mobile app that is available for download from their system's mobile app store. The variety of delivery methods ensures Sailors have options to complete Touchpoint training that best fit their situation and learning style.



SLIDE 13

In-person Training

Here are some examples of PFMs, PFCs, and actual CFS delivering the in-person options.



SLIDE 14

Virtual Training

For visual learners, virtual, self-paced options are available. Encourage Sailors to download the MyNavy Financial Literacy mobile app. This option gives members the flexibility to complete the training when they have a free moment at work or choose to complete once they are off work.

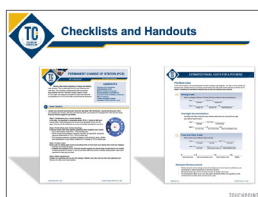
Those accustomed to the Navy e-Learning platform also have the option to complete the training on their own. Remember that those who complete the training via the app must turn over their completion certificate to their training department for FLT MPS upload while those visiting the Navy e-Learning portal are automatically updated.



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Touchpoint Examples

Now you understand the options our Sailors have when it comes to completing their required Touchpoint training, we will take a look at the content from our presentations to our checklists. Feel free to review our Navy Resource Page on the FINRED website and become familiar with where you can access on various digital systems. The great thing is you do not need a Common Access Card (CaC) or a special password.



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Checklists and Handouts

Each Touchpoint has a Counselor and Counselee Checklist. Each checklist provides actionable, relevant, and timely information that Service members can use to make informed financial decisions. Both have the same content so here's the main difference.

- The Counselor Checklist has notes that help guide your conversation with your counselee.
- The Counselee Checklist has signature blocks for both of you to sign and date to indicate when the counseling was completed. Counselee Checklists also include the catalog identification number (CIN) along the bottom banner. This should be given to the member regardless the path of training they undertake.

In the top right corner, there is a blue box that lists handouts applicable to that Touchpoint. Handouts provide more detailed information to reinforce learning objectives. These checklists are great tools for everyone. They serve as fundamental learning tools for financially inexperienced Service members or reminders for those who are already on track with their finances. They are comprehensive and proactive tools that help you to handle small tasks before they become big issues. You don't have to be an expert in every topic.



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Slides and Instructor Guide

Each Touchpoint has a PPT presentation and Instructor Guide. You may choose this option to deliver Touchpoint Curriculum training if you have a group of Service members that need the same training at the same time.

Even if you decide to teach from a PPT, you will reference checklists and handouts throughout the presentation. You may offer a hybrid training environment that consists of using the checklist, videos, and PowerPoint presentation for each Touchpoint.

Please note: If teaching a group of individuals, you may also turn in the class attendance roster to the training department for FLT MPS entry of those who attended.



SLIDE 18

Video Discussion Guide

Videos and Video Discussion Guides (VDG) may be used to satisfy Touchpoint Curriculum. These are a series of short videos that you can use if you are not familiar teaching a topic. The VDG gives specific talking points and knowledge checks between videos.

This may be a great way to provide training to your command if you aren't 100% comfortable teaching a class with a PPT presentation.

With both methods of classroom training, PPT and videos, you'll ***always use the checklists and handouts***. Remember to sign and date the Counselee Checklist to verify completion of training.

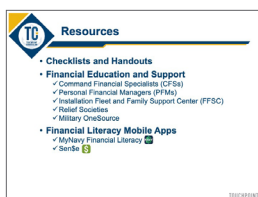
Please note: If teaching a group of individuals, you may also turn in the class attendance roster to the training department for FLT MPS entry of those who attended.



SLIDE 19

Resources

We covered the Touchpoint requirements including what they are and why they are important. We've also discussed how to complete the training and different options for completion including in-person and virtual courses. Next, let's turn our attention and focus on resources to effectively manage your program and assist those who have questions.



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Resources, continued

Checklists and handouts

These are great resources to help navigate the financial decisions you'll need to make and help others make, so become familiar with them and refer back to them. They're available on the FINRED Navy Resource page at <https://finred.usalearning.gov/SPL/ServiceResources/NavyResource>.

Financial education and support

You are not alone! You have many layers of support to help you learn more and make good financial decisions.

Financial literacy mobile apps

You may also access the FINRED Sen\$e mobile app or the MyNavy Financial Literacy mobile app for assistance with a variety of personal finance issues.



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Questions?

As a reminder, Touchpoint Curriculum is a life cycle/career cycle approach to financial literacy training. As a CFS, you play a critical role in its delivery. You are your command's subject matter expert but you are not alone. Partner with your PFM or PFC whenever you need assistance. We are here for you. Thank you in advance for helping improve mission readiness through financial readiness. Questions?