Financial Literacy 101
Administrative Guide

Updated October 3, 2008

Congratulations for choosing Financial Literacy 101, an innovative and effective program for teaching money management skills to college students. This guide will help your organization get the most out of the course, and covers everything you need to get started.

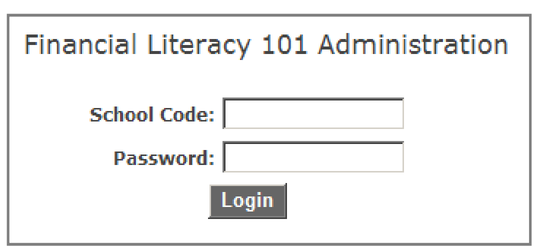
Please spend a few moments reviewing this guide (or use the interactive setup wizard within the administrative interface) before sending students to your new course.

Here are a few terms used throughout this document:

> *Administrative Control Panel* – The Financial Literacy 101 interface used to set up and administer the course, view course usage statistics, create reports, and export user data.
>
> *Primary Access Code* – This is the access code first used to set up your account. Logging in with the primary access code reveals all set up options for your organization.
>
> *Secondary Access Code* – These access codes are used for other groups within your organization. Secondary access codes are useful for sharing administrative responsibilities across departments and for keeping separate lists of students for tracking and reporting purposes. Secondary access code administrators have access to their own administrative control panel, but cannot set up additional access codes.
>
> *Site License* – Each Financial Literacy 101 customer is provided unlimited course usage for a particular "site." The site license covers the organization making the original agreement with Decision Partners, and is typically a single university campus. If you intend to use the course at more than one site, you must obtain permission from Decision Partners.

If you have questions not addressed in this guide, please contact your Decision Partners representative, or contact us through DecisionPartners.org.

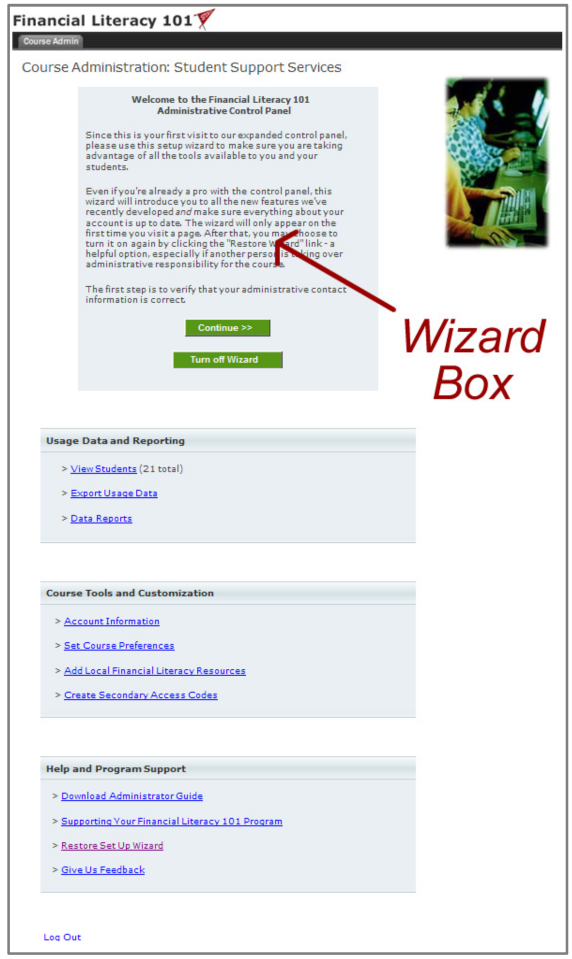
Accessing the Administrative Control Panel



To use the control panel, either click "Administrator Login" from the Financial Literacy 101 homepage, or enter the following address in your web browser: http://www.financialliteracy101.org/admin.

Once you arrive at the control panel login, you will be prompted to enter your access code and password. The access code you should enter is the *primary* access code for your organization. The password is supplied by Decision Partners.

Introducing the Setup Wizard



All of the information covered in this guide is also covered by the course setup wizard. When you login to the administrative control panel for the first time, the wizard is automatically activated. Simply follow the instructions to set up your course.

The setup wizard may be turned on or off at any time. You may also view the wizard content for each page by clicking the "Help" link on each page within the administrative control panel.

We recommend using the wizard when setting up your account – it ensures that no option is overlooked, and makes sure that you take advantage of all the tools available to you and your students.

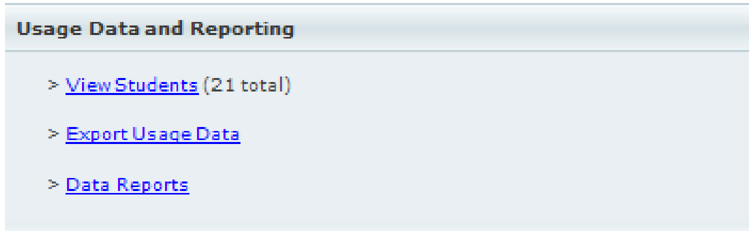
The wizard is not only handy for the main administrative contact, but will also help familiarize others with the control panel in the event that the course is managed by more than one individual or if a new administrator takes responsibility for managing the course.

The wizard is automatically turned off for each page visited provided the "Next" link is clicked. Once all set up wizard pages have been visited, the tool is turned off unless reactivated by clicking "Restore Setup Wizard" on the main page of the control panel.

Using this Guide

This guide will take you step by step through each page in the control panel. There are three feature categories in the control panel: Usage and Data Reporting, Course Tools and Customization, and Help and Program Support.

Usage and Data Reporting



View Students

The View Students Tool is a powerful resource for determining student participation and success. From this screen, you may:

> *Contact students* - Simply click on their name and your email program (such as Outlook) will open. If you use a web-based email program that does not work with direct links, contact us and we will enable web-based notifications for your account. We prefer that administrators use their own email accounts when possible, since automated emails containing such words as “financial” are occasionally flagged as spam and do not reach the recipient’s inbox.
>
> *Sort the list* – The sort feature lets you drill down to just the user or users you would like to focus on (by default, the list is organized by last name). You may sort users by last name, year in school, date of last login to the course, and course progress. Simply click on the link at the top of each column to organize the list by the data in the column. Click it again to sort in reverse order.
>
> *Archive students* - Archiving a student does not remove their information permanently; it simply hides it from active view in the main student list. You may click on “View Archived Users” anytime to get details on users that have been archived. You may also “un-archive” students by clicking on the green arrow in each student’s record.

Archiving users is a great way to focus only on those users who have *not* completed the course. To save time, you may also click on the “Archive All Completed” button at the bottom of the screen – all users who have completed the course will be sent to the archive list.

Export Usage Data

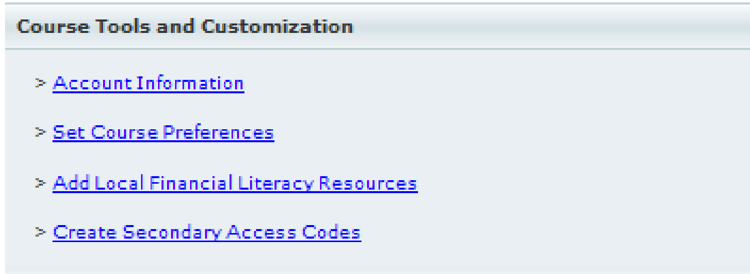
Exporting usage data for reporting or site audits couldn’t be easier than with our Export Tool. Simply select the date range you need and click “Download.” The data will be exported in Excel format.

Users of Excel 2007 may get a warning message before the data opens. Simply click “OK” to open the data.

Data Reports

Using the self-serve data report feature will be documented in a separate user guide.

Course Tools and Customization



Account Information

Use the account information page to verify both administrative and billing contacts for your organization. Please be sure to keep this information up to date – course announcements are sent to the email address listed on this page.

Course Preferences

The course preferences page allows you to:

- Modify the primary course access code.
- Add a page of welcome text for students just starting the course.
- Require that students enter their student ID when starting the course.

The primary access code is required, but the welcome text and student ID requirements are optional. Please note that the welcome text and student ID requirements are valid only for the primary access code. Secondary access codes have the option of entering different welcome text (or none at all) and either requiring or not requiring student IDs.

You may update these preferences anytime.

Add Local Financial Literacy Resources

If your campus or community has in-person financial counseling or education resources, we encourage you to enter them on this page. After students complete the course, the list of resources will be displayed. The list will also be added to each student's "My Money" homepage.

Please note that by default, the course suggests that students contact their financial aid office if they are experiencing a problem paying for school. So the resources here should be *in addition* to the financial aid office.

Secondary access codes will see the resources you have already entered and have the option of using your listings and/or their own.

Secondary Access Codes

As the master course administrator, you may create an unlimited number of access codes for use at your site.

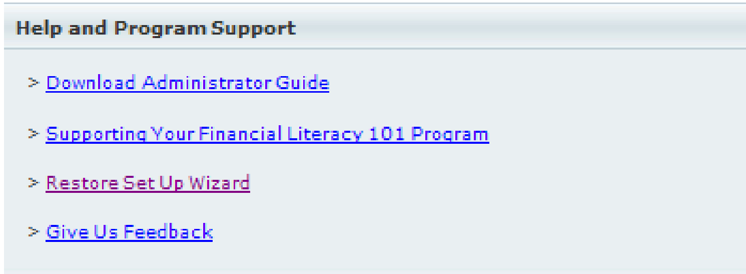
Here's an example of how this functionality course work – if the master administrator is a financial aid administrator, they will probably use the main access code with their students. That way, each student who takes the course as the result of financial aid programs will be displayed in that control panel – making it easy to assess not only student progress, but the effectiveness of marketing and other outreach programs.

But many other campus departments may be interested in using Financial Literacy 101 and may even wish to require it for certain students. Rather than mixing students from different departments, additional access codes may be set up to accommodate any group. There could be access codes for TRIO, SAP, FYE, University 101 courses, and even individual campus departments. Each of those access codes may then create additional access codes for classroom or workgroup use.

Setting up new access codes

To set up a new access code, you only need the administrator's name, email address, and an access code (may be changed by the administrator later). We will automatically send the administrator an email notification with instructions for getting started and we will also display that information for your records. We suggest copying the information and emailing it to the contact to ensure delivery – some spam filters flag emails with "financial" in the text and, as a result, do not reach the recipient's inbox.

Help and Program Support



A number of resources are available to help you promote Financial Literacy on your campus. These resources are listed under the Supporting Your Financial Literacy 101 Program link. Resources include:

Instructor Guide - The online instructor guide is useful for anyone who is either administering a course or using it in a group setting. The guide covers the entire curriculum and offers direct links to fact sheets, multimedia modules, exercises, PowerPoint presentations, and additional resources. The guide may be found at http://www.financialliteracy101.org/guide.

Course Verification Tool – Administrators and instructors may use this online tool to verify course completion codes supplied by the student. The tool may be accessed through the link on the Financial Literacy 101 homepage or at http://www.financialliteracy101.org/Admin/confirm.cfm.

Student Power Point Presentation – This presentation is useful for introducing student groups to the course. Discussion topics are found in the notes section. We encourage you to customize this presentation to your organization.

Marketing Financial Literacy – This one-page document contains implementation and marketing ideas for making your program a success.

Press Release – This press release about Financial Literacy 101 is designed to be customized by you to your organization. It is an ideal way to announce the course to your community.

Finding Additional Help

If you have questions not addressed in this document, please email us at:

admin_help@decisionpartners.org

Please send us your access code and contact information for follow up.