



Implementation Checklist for iGrad

iGrad is a powerful online financial literacy website that you can use with your students to help create budgets, increase awareness of financial aid and student loans, and teach concepts of financial understanding.

It is essential that iGrad be programmed into a student's formal college curriculum in order to be effective. Whereas some students may voluntarily sign-in, most require the college to make iGrad a formal or soft requirement.

iGrad Administration

The campus point of contact working with Trellis on iGrad should complete the following information.

Institution Name _____

Person responsible for implementing iGrad at your campus (i.e. promoting it, reviewing usage reports, working with Trellis on increasing usage):

Person completing this form:

Name _____

Name _____

Title _____

Title _____

Email _____

Email _____

Phone _____

Phone _____

Date college submitted college logo for customizing the site: _____

Date attended training session with iGrad: _____

Will your college allow SSO sign-in? Yes No

If yes, date your IT department will create the login scripts: _____

If yes, key contact email address: _____

iGrad Audience and Usage

Please indicate where iGrad will be assigned to the following student audiences. Check all that apply.

Incoming and First Year Students

- New Student Orientation
- First Year Seminar
- Other _____

Currently Enrolled Students

- Emergency Aid Recipients
- Payment Plan Students
- Student Loan Borrowers
- Career Development Courses
- Other _____

Graduating Students

- Post-enrollment opportunities (if your campus uses SSO for on-campus sign-in, be sure alumni create their own user ID before leaving the campus)

iGrad Promotion

Please indicate how iGrad will be promoted to student audiences. Check all that apply.

How will the campus promote iGrad (e.g. orientation, syllabus, flyers, in-person referral from counselors)? List strategies:

How many students do you expect to sign-up to use iGrad?

A good goal should be at least 25% of your institution's total enrollment. Number of student sign-up goal _____

Which of the following iGrad courses do you expect each student to complete? See page 3 of this document for information about the courses. At least 3 of the following per student is recommended:

- | | |
|--|---|
| <input type="checkbox"/> Borrowing smart and preparing for higher education | When will you implement it?
<input type="checkbox"/> Prior to enrollment <input type="checkbox"/> First Year Seminar
<input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Creating a Budget (and sticking to it) | <input type="checkbox"/> Prior to enrollment <input type="checkbox"/> First Year Seminar
<input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Staying on track with student loans while in school | <input type="checkbox"/> Prior to enrollment <input type="checkbox"/> First Year Seminar
<input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Creating a financial plan for your priorities and goals | <input type="checkbox"/> Prior to enrollment <input type="checkbox"/> First Year Seminar
<input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Prior to enrollment <input type="checkbox"/> First Year Seminar
<input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Prior to enrollment <input type="checkbox"/> First Year Seminar
<input type="checkbox"/> Other _____ |

Items needed from Trellis to promote iGrad:

- | | |
|---|---|
| <input type="checkbox"/> Flyers
<input type="checkbox"/> Posters
<input type="checkbox"/> Other print artifacts | <input type="checkbox"/> Text messaging campaign
<input type="checkbox"/> Email templates
<input type="checkbox"/> Social media content |
|---|---|

Notes

Create an account at [www.igrad.com/schools/\(Your School Site\)](http://www.igrad.com/schools/(Your School Site)) and complete the **Financial Wellness Checkup** to get started.

NEW STUDENTS	
ASSIGNMENT SUGGESTIONS	IMPLEMENTATION IDEAS
<p>Complete courses:</p> <ul style="list-style-type: none"> Borrowing smart and preparing for higher education Creating a financial plan for your priorities and goals 	<ul style="list-style-type: none"> Assign courses during orientation and create incentives for students who complete it before the first day of class: small giveaways from the college bookstore, drawing for gift card or scholarship Include link to articles in emails/text communication with admitted students
<p>Read articles:</p> <ul style="list-style-type: none"> Everything You Need to Know to Get Started With Paying for College Top 10 College Student Essentials on the Cheap 	
<p>Tryout tools:</p> <ul style="list-style-type: none"> Your Money Personality 	
FIRST-YEAR STUDENTS	
ASSIGNMENT SUGGESTIONS	IMPLEMENTATION IDEAS
<p>Complete courses:</p> <ul style="list-style-type: none"> Creating a Budget (and sticking to it) Staying on track with student loans while in school 	<ul style="list-style-type: none"> Incorporate into First-Year Experience course: include in syllabus as extra credit opportunities, reading and reflection assignments, classroom discussion
<p>Read articles:</p> <ul style="list-style-type: none"> How to Write a Scholarship Essay That Makes You Stand Out How to Access Your Federal Student Loans and Grants on the NSLDS 	
<p>Tryout tools:</p> <ul style="list-style-type: none"> Complete "Budget" Use "Scholarship Search" to identify two potential scholarship opportunities 	
GRADUATING STUDENTS	
ASSIGNMENT SUGGESTIONS	IMPLEMENTATION IDEAS
<p>Complete courses:</p> <ul style="list-style-type: none"> Understanding your paycheck and W2 Investing to build wealth Repaying your student loans 	<ul style="list-style-type: none"> Incorporate into capstone course Include on graduation checklist Resource table at career fair
<p>Read articles:</p> <ul style="list-style-type: none"> Everything You Need to Know About Employee Benefits and Compensation Student Loan Success: Three Keys to Starting Off on the Right Foot Everything You Need to Know to Get Started With Building a Career 	
<p>Tryout tools:</p> <ul style="list-style-type: none"> iGrad Job Search Tool Play "Invest Quest" game on iGrad 	