

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	Date attended	
college logo for customizing the site:	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	Currently Enrolled Students	Graduating Students
 New Student Orientation First Year Seminar Other 	 Emergency Aid Recipients Payment Plan Students Student Loan Borrowers Career Development Courses Other 	□ 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

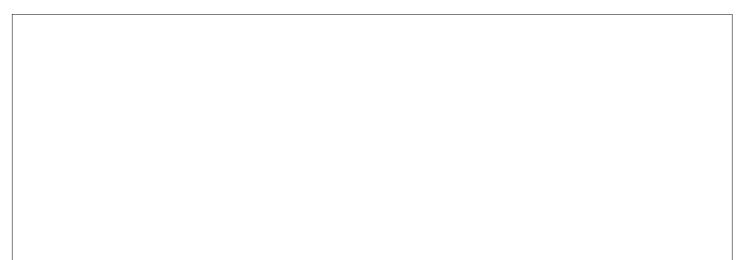


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Which of the following iGrad courses do you expect each student to complete? See page 3 of this document for information about the courses. At least 3 of the following per student is recommended:

	When will you implement it?
□ Borrowing smart and preparing for higher education	□ Prior to enrollment □ First Year Seminar
	Other
□ Creating a Budget (and sticking to it)	□ Prior to enrollment □ First Year Seminar
	□ Other
□ Staying on track with student loans while in school	□ Prior to enrollment □ First Year Seminar
	Other
Creating a financial plan for your priorities and goals	□ Prior to enrollment □ First Year Seminar
	Other
□ Other	
	□ Prior to enrollment □ First Year Seminar
	Other
Other	
	□ Prior to enrollment □ First Year Seminar
	Other
Items needed from Trellis to promote iGrad:	
□ Flyers	Text messaging campaign
□ Posters	Email templates
□ Other print artifacts	□ Social media content

Notes





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

NEW STUDENTS	
ASSIGNMENT SUGGESTIONS	IMPLEMENTATION IDEAS
Complete courses: • Borrowing smart and preparing for higher education • Creating a financial plan for your priorities and goals	 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
Read articles: • Everything You Need to Know to Get Started With Paying for College • Top 10 College Student Essentials on the Cheap	
Tryout tools : • Your Money Personality	
FIRST-YEAR STUDENTS	
ASSIGNMENT SUGGESTIONS	IMPLEMENTATION IDEAS
Complete courses: • Creating a Budget (and sticking to it) • Staying on track with student loans while in school	Incorporate into First-Year Experience course: include in syllabus as extra credit opportunities, reading and reflection assignments, classroom discussion
Read articles: • How to Write a Scholarship Essay That Makes You Stand Out • How to Access Your Federal Student Loans and Grants on the NSLDS	
 Tryout tools: Complete "Budget" Use "Scholarship Search" to identify two potential scholarship opportunities 	
GRADUATING STUDENTS	
ASSIGNMENT SUGGESTIONS	IMPLEMENTATION IDEAS
Complete courses: • Understanding your paycheck and W2 • Investing to build wealth • Repaying your student loans	 Incorporate into capstone course Include on graduation checklist Resource table at career fair
Read articles: • 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	
Tryout tools:	-
Constant Tech Constant Tech	

• iGrad Job Search Tool

• Play "Invest Quest" game on iGrad