



Personalized Learning Program Participant User Guide

Clearpoint University
November, 2017

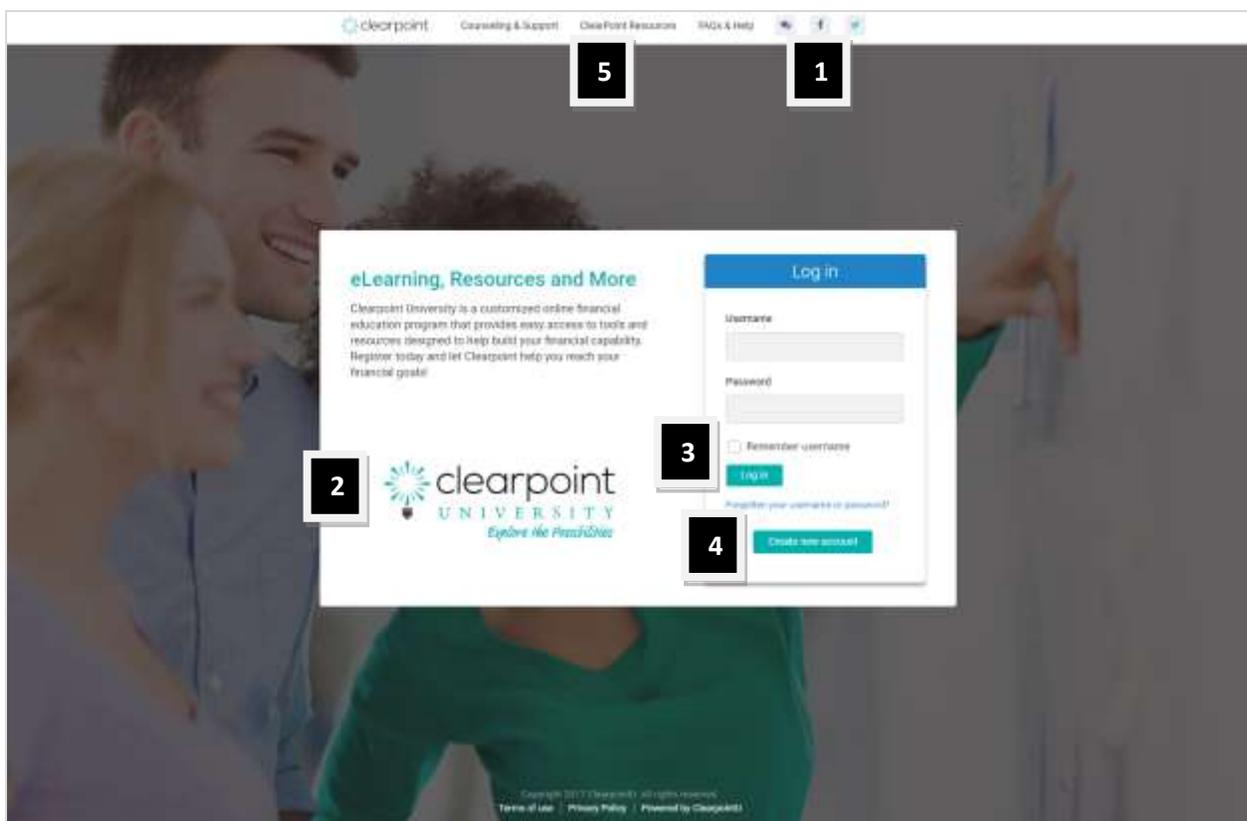
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Program Introduction and Landing Page

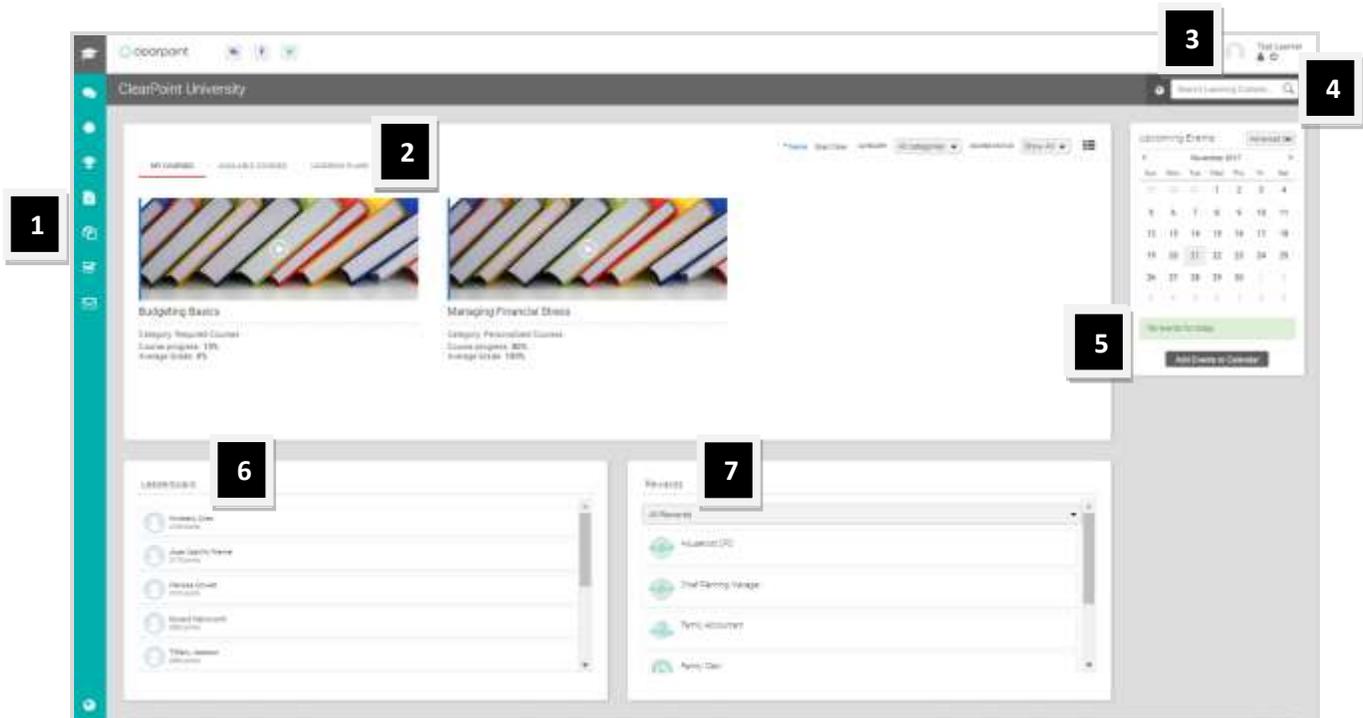
Clearpoint University (ClearpointU) is an online financial literacy resource designed to help learners enhance financial capability and manage their money wisely. The program includes interactive learning modules, activities, assessments, credits and rewards, tools, calculators, and personalized action plans.

ClearpointU can be accessed from a personal computer or mobile device and may require current browser compatibility.



- 1 – Click to connect via chat or social media, if applicable
- 2 – View partner logo or click play to watch a short video, if applicable
- 3 – Returning users enter username and password, and click login to access the program
Click the ‘Forgotten your username or password?’ link for a password reminder
- 4 – New users click ‘create new account’ to register and create a password
- 5 – Click to expand menus for additional tools and resources

Learner Dashboard



- 1 – Access side bar menu items
- 2 – Enroll in or access education courses
- 3 – Manage learner profile
- 4 – Search program content
- 5 – Add or manage calendar events
- 6 – Top program credits earned by learner
- 7 – View your program rewards

Registration and Login

To register from the landing page:

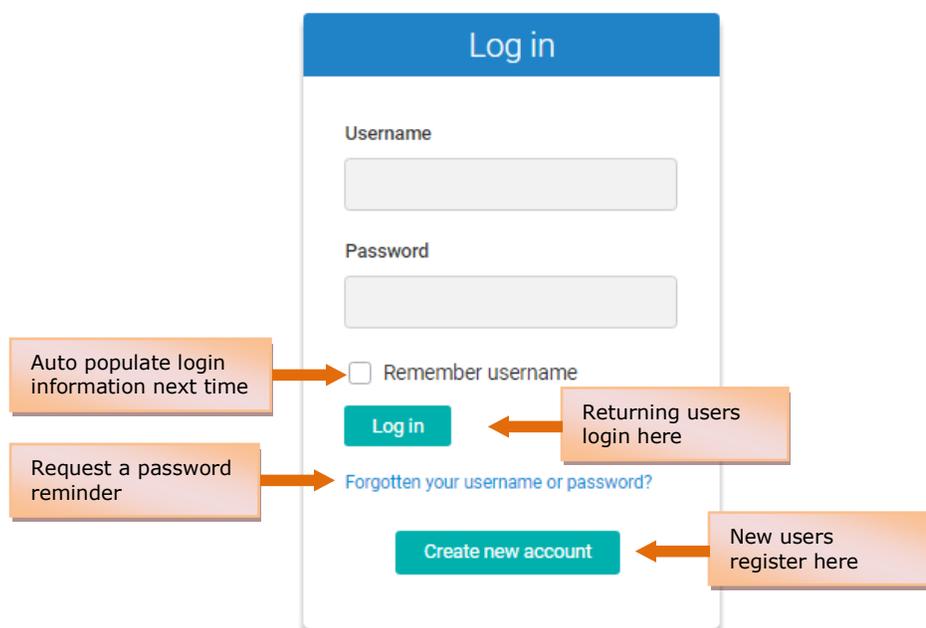
1. Click the 'create new account' icon to access the registration page
2. Enter the appropriate information in each field and click 'Create my new account'
 1. Required fields are marked with a red asterisk
3. Make note of the username and password for future login

To login from the landing page:

1. Enter your username and password under the Log In tab and click 'Login'

To receive a password reminder:

1. Click the 'forgotten your username or password?' link. The password will be sent to the email address on file.

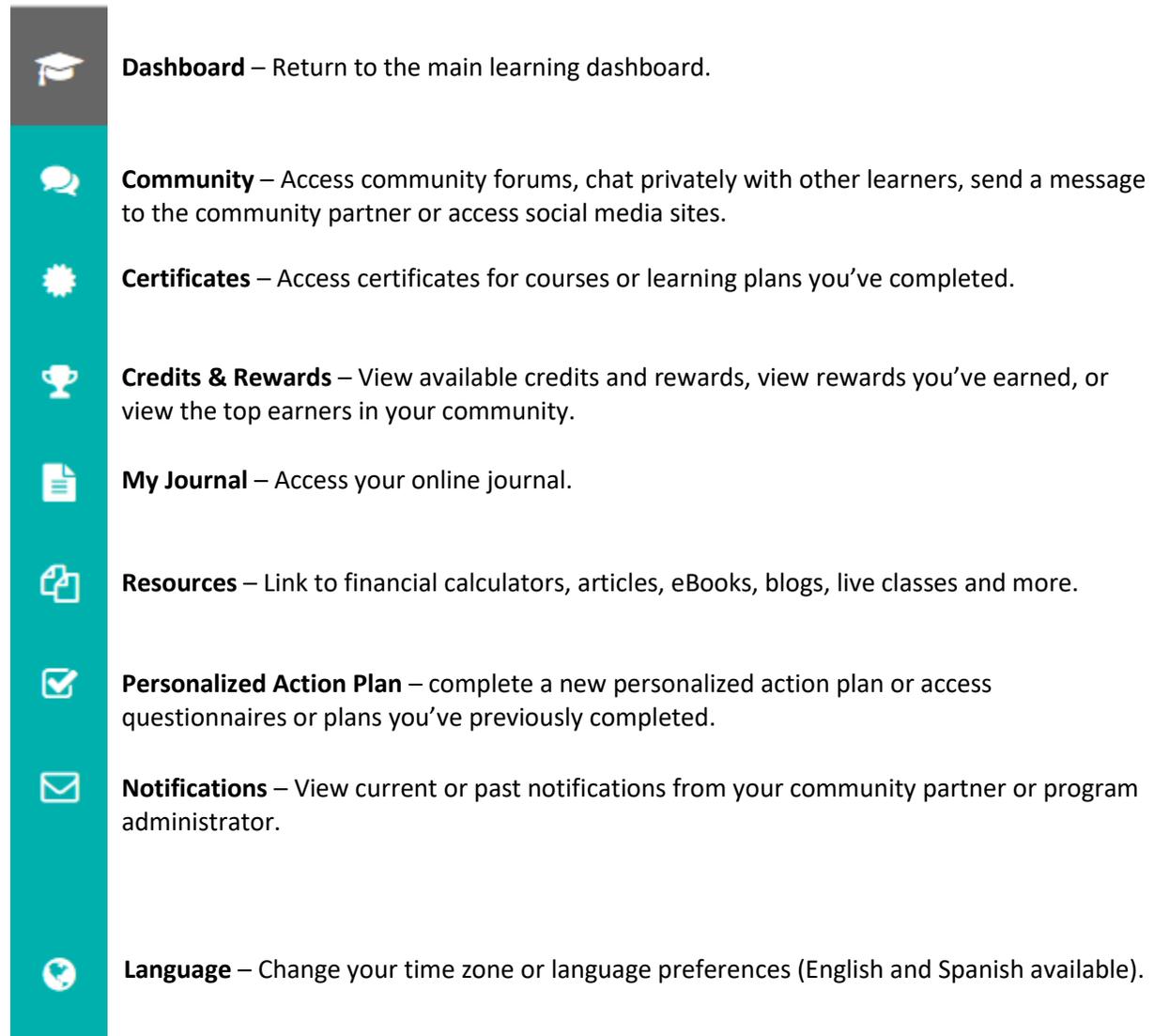


The diagram shows a 'Log in' form with the following elements and callouts:

- Username** and **Password** input fields.
- Remember username**: Callout: 'Auto populate login information next time'.
- Log in** button: Callout: 'Returning users login here'.
- [Forgotten your username or password?](#): Callout: 'Request a password reminder'.
- Create new account** button: Callout: 'New users register here'.

Side Bar Navigation

ClearpointU includes a side bar menu for easy navigation. Click each icon to access additional program tools and resources.



-  **Dashboard** – Return to the main learning dashboard.
-  **Community** – Access community forums, chat privately with other learners, send a message to the community partner or access social media sites.
-  **Certificates** – Access certificates for courses or learning plans you’ve completed.
-  **Credits & Rewards** – View available credits and rewards, view rewards you’ve earned, or view the top earners in your community.
-  **My Journal** – Access your online journal.
-  **Resources** – Link to financial calculators, articles, eBooks, blogs, live classes and more.
-  **Personalized Action Plan** – complete a new personalized action plan or access questionnaires or plans you’ve previously completed.
-  **Notifications** – View current or past notifications from your community partner or program administrator.
-  **Language** – Change your time zone or language preferences (English and Spanish available).

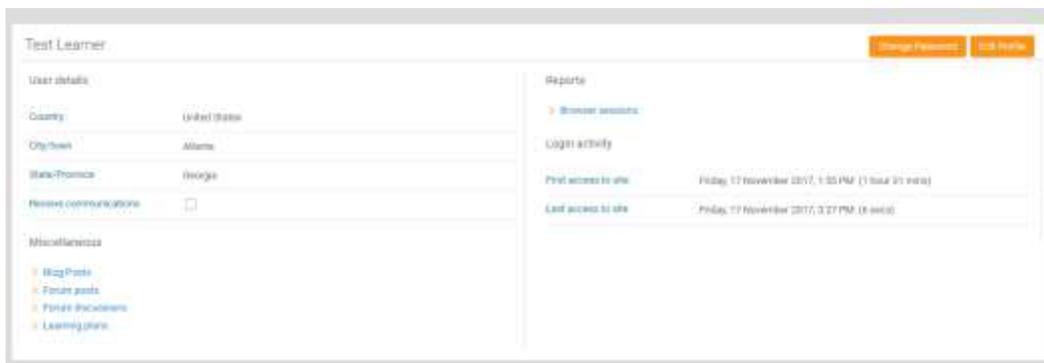
Update Profile Information and Opt In/Out

Take the following steps to update learner profile information:

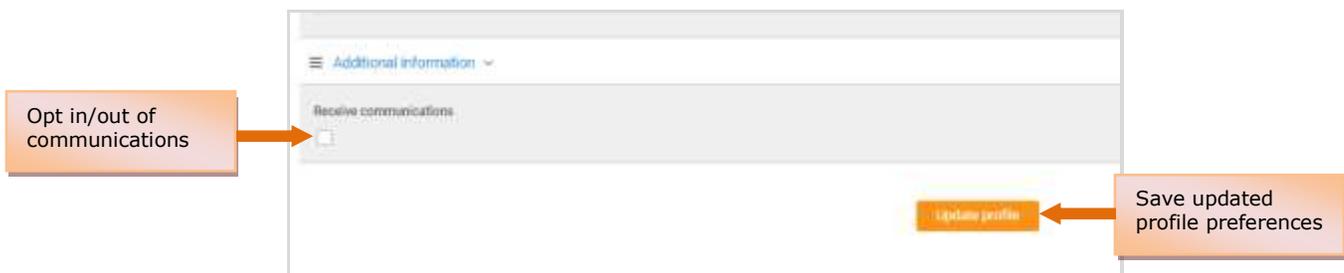
1. Select the 'Profile' icon at the top of any page to access your profile information



2. Click 'Change Password' to update your password or click 'Edit Profile' to update/add personal information including avatars and social media links



Edit Profile allows you to update information and opt out/in of email communication from Clearpoint. To opt in/out, select the 'Additional Information' menu and check to select or deselect the 'Receive communications' box. Select Update profile to save your preferences.

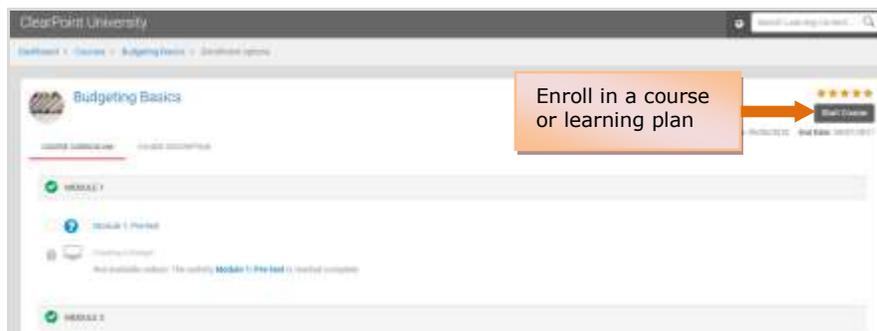


Enroll in Courses and Learning Plans

ClearpointU includes interactive education courses. Each course includes 3 to 5 minute learning modules, related activities and pre/post-tests. You may enroll in individual courses or learning plans, which include several courses.

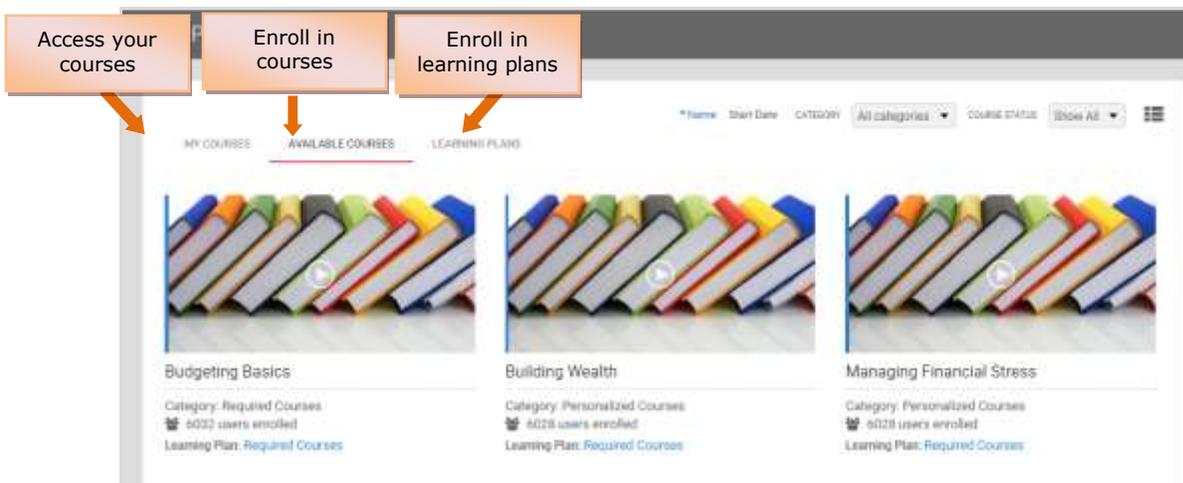
To enroll in courses or learning plans from the main dashboard:

1. Select the desired course or learning plan then select the 'Start Course/Plan' icon and follow the prompts to confirm enrollment



To access courses from the main dashboard:

1. Select 'My Courses' to view courses you're currently enrolled in
or
Select 'Available Courses' to view and enroll in available courses
or
Select 'Learning Plans' to view and enroll in available learning plans



Intake and Exit Assessments

Intake and exit assessments help gauge learner progress and are not graded. You will be directed to complete the intake assessment before accessing course modules. The exit assessment should be completed at the end of the program.

The intake assessment will launch automatically when attempting to complete the first course:

1. Answer each question and select the 'Submit Survey' icon to complete the intake assessment
 - The intake assessment can be completed only one time
 - The exit assessment will be available only after all ClearpointU courses and activities are complete and should launch automatically

Intake Assessment

1 Have you taken time to write down your short-term and long-term goals?

Yes, I have written down all my short-term and long-term goals
 Yes, I have written down one or two of my short-term and long-term goals
 No, I have never written down my short-term or long-term goals
 No, but I will write down my short-term and long-term goals
 No, and I do not need to write down my short-term and long-term goals
 No answer

2 What challenges or obstacles prevent you from reaching your goals? (Check all that apply)

Transportation issues
 Housing issues
 Family issues
 Childcare issues
 Financial issues
 Difficulty finding employment
 Language issues
 No challenges

3 Are you saving money on a regular basis?

Yes, I am saving on a regular basis
 Yes, I save periodically as money is available
 No, but I would like to save on a regular basis
 No, I am not saving on a regular basis
 No answer

4 Select one financial goal you would like to achieve in the next year.

Establish a banking relationship
 Build long term assets
 Reduce or eliminate debt
 Build long term wealth
 Save for your financial goals
 Reshape your credit
 Maintain financial stability
 No answer

5 Would you like ClearPoint to contact you via survey on a quarterly basis to help you reach your financial goals?

Yes No No answer

Submit survey

Courses

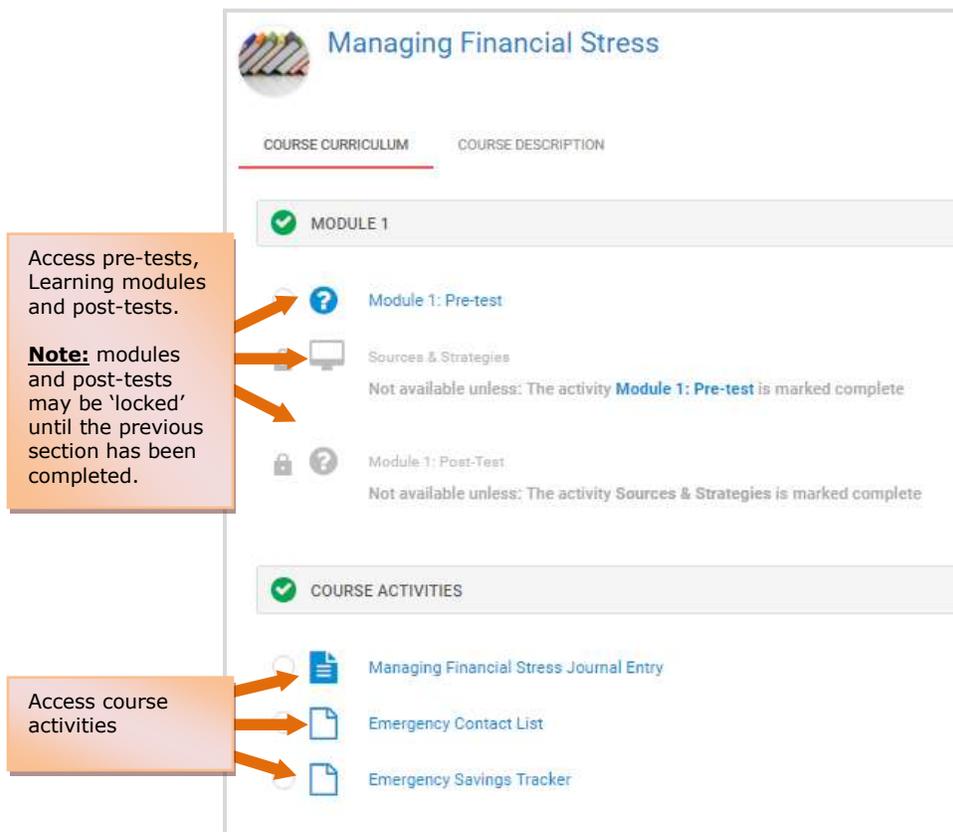
Each education course includes 3 to 5 minute learning modules, related activities and pre/post-tests.

To access an education course:

1. Select the arrow on the desired course to view it's contents



2. Select the corresponding link to view and complete each section of the course



Access pre-tests, Learning modules and post-tests.

Note: modules and post-tests may be 'locked' until the previous section has been completed.

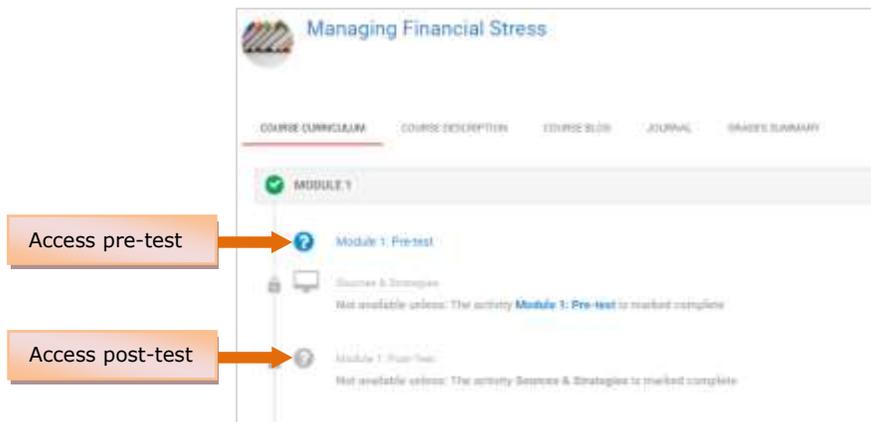
Access course activities

Pre and Post-Tests

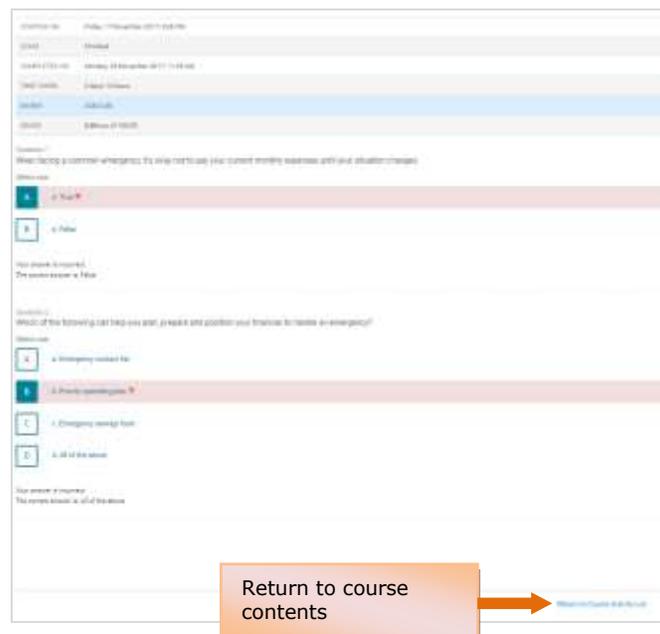
Pre-tests occur before each learning module. Learners can ‘test out’ of a learning module with a pre-test score of 100%. Pre-tests can be completed only once. Post-tests occur at the end of each course and must be passed with a minimum score of 80%. Post-tests can be attempted an unlimited number of times or until passed.

To access pre- and post-tests within a course:

1. Select the test you want to access. **Note:** post-tests will only be available after all pre-tests and course modules have been completed.



2. Follow the prompts to answer questions and submit responses. A review of responses and correct answers will launch automatically, as shown below.

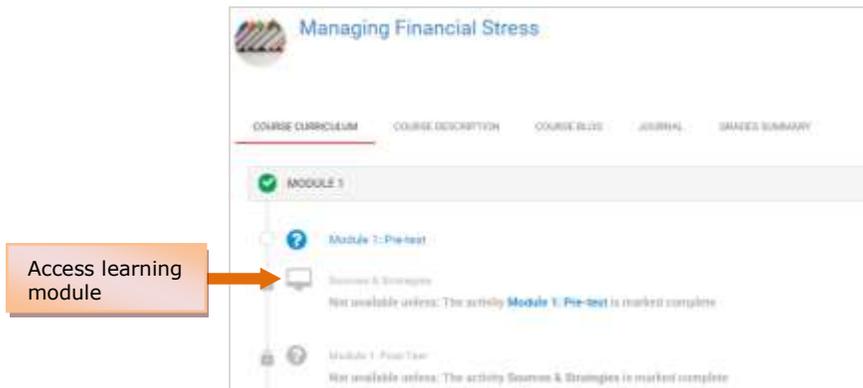


Learning Modules

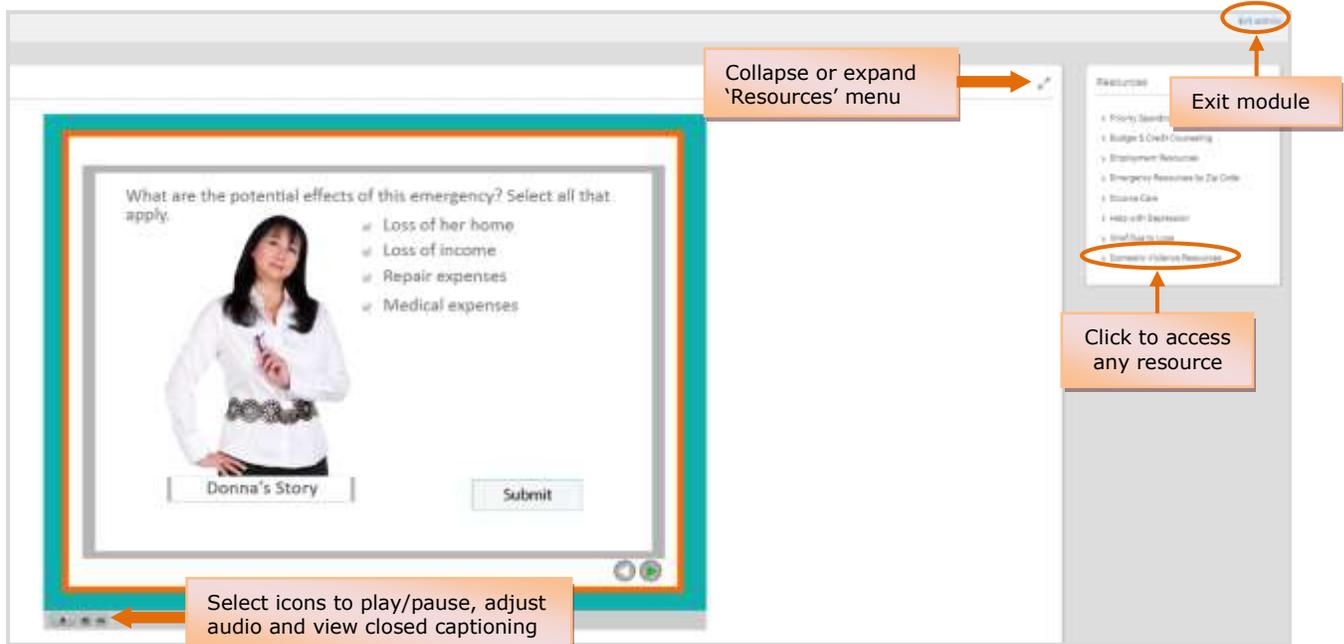
Learning modules are audio guided, interactive and include additional resources.

To access learning modules within a course:

1. Select the learning module you want to access. **Note:** a learning module will only be available after the pre-test has been successfully completed.



Once accessed, learning modules include playback options and additional resources.

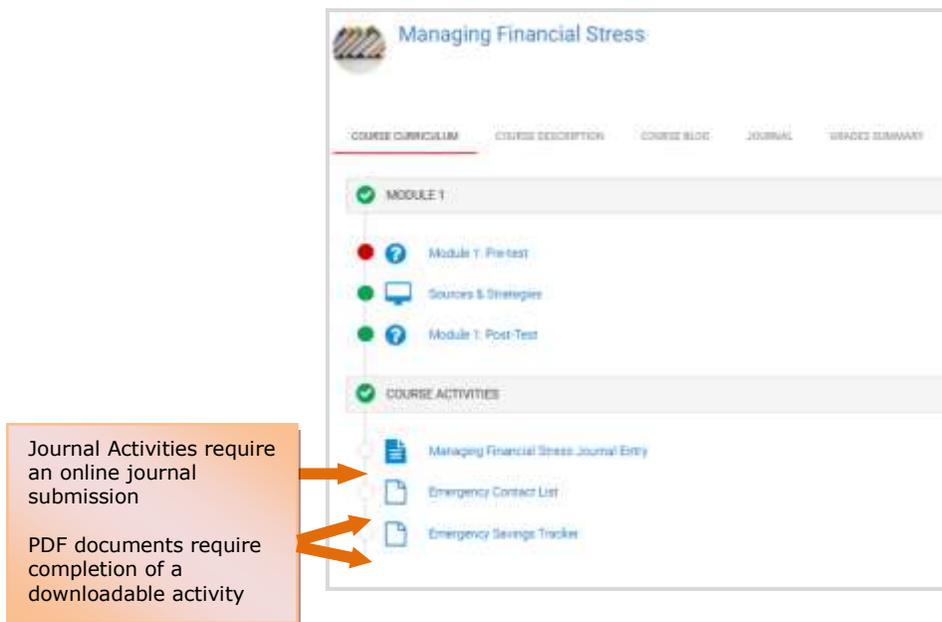


Course Activities

Course activities provide hands-on opportunities to put what you learned into action. Each course includes activities that must be completed to successfully complete the course. Activities

To access activities within a course:

1. Select the activity you want to access



Journal Activities require an online journal submission

PDF documents require completion of a downloadable activity

Sample Journal Activity



Managing Financial Stress Journal Entry

Click [here](#) to measure your financial health by taking the ClearPoint Financial Health Quiz.

1. Did you answer "yes" to more than 3 questions?

2. List at least two strategies you will implement to improve your overall financial health.

Monday 22-November 2017 1:07 PM
Completed 2/65 in 2 questions

To improve my overall financial health I will (1) check my credit report regularly and (2) develop a debt reduction plan.

Add a journal entry → Add entry

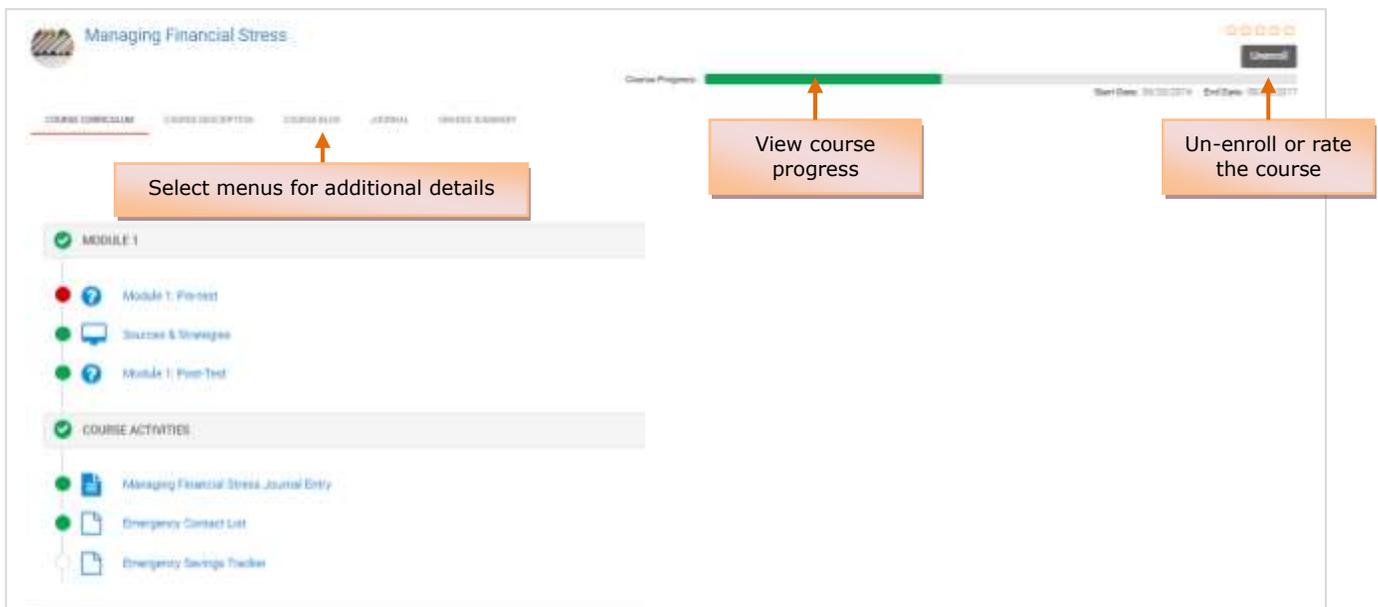
Edit/delete an entry → Edit Delete

Course Details and Progress

Details and progress for each course can be viewed on the course page.

To view course details and progress:

1. From the course page, view progress and select from the following menus for additional details:
 - Course Curriculum – view contents of a course
 - Course Description – view a brief course overview
 - Course Blog – create a new course post or respond to an exiting post
 - Journal – view/edit course journal entries previously created
 - Grades Summary – view a summary of completion attempts and grades



2. View the course timeline for the status of tests, modules and activities

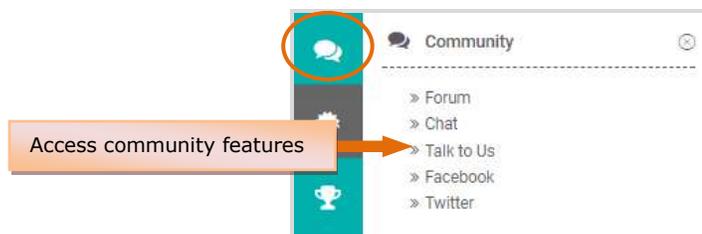
- Test/module/activity not yet accessed
- Test/module/activity passed
- Test/module/activity failed

Community Features

Community features allow learners to connect and share with others in their learning community through forums, chat, talk to us, and social media.

To access community features:

1. Select the 'Community' icon and select the feature you want to access:
 - Forum – interact with all learners by creating a new post or replying to an existing one
 - Chat – chat privately with other learners in the community
 - Talk to us – send a private message to the community partner or administrator
 - Facebook/Twitter/YouTube – access social media sites



Certificates

Certificates of completion are issued after courses or learning plans are successfully completed.

To access a certificate of completion:

1. Select the 'Certificates' icon and select the certificate of completion you want to access. Certificates can be saved, printed or downloaded.



Credits and Rewards

Credits are earned for actions taken in ClearpointU. Credits can be redeemed for rewards, including online badges and community specific rewards, if applicable.

To view credits and rewards:

1. Select the 'Credits & Rewards icon' and select the feature you want to access:
 - Leaderboard – view learners with the most credits in your community
 - My Rewards – access and redeem rewards you've earned
 - Earn Credits & Rewards – select the *Earn Credits* tab to view credits available for each action taken. Select the *Get Rewards* tab to view rewards available for credits earned.



Online Journal

The online journal helps track progress towards financial goals. Initial journal entries are completed in each course and can be viewed, updated or added to at any time.

To view or edit an online journal:

1. Select the 'My Journal' icon and select the journal entry you want to access



Resources

Links to additional resources provide support for ongoing financial wellness.

To access additional resources:

1. Select the 'Resources' icon and select the resource you want to access:
 - Live classes – view a schedule of in-person classes and webinars
 - eBooks – view published eBooks on a variety of financial topics
 - Calculators – access interactive tools and financial calculators
 - Tools – access Clearpoint 'link to us' tools and YouTube videos
 - Others – view client testimonials and financial articles

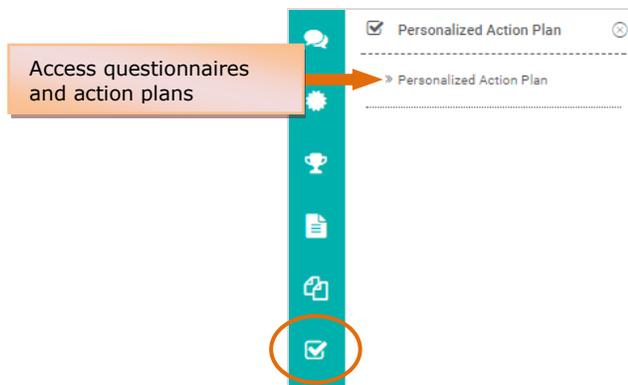


Personalized Action Plans

Personalized action plans help learners record and track financial goals over time by identifying specific goals, realistic action steps and target completion dates. Action plans begin with a questionnaire which drives the items on each action plan.

To complete a personalized action plan:

1. Select the 'Personalized Action Plan' icon, then select the 'Personalized Action Plan' link



- Complete the questionnaire and select 'Save' to access the personalized action plan

Participant Action Plan

QUESTIONNAIRE PERSONALIZED ACTION PLAN QUESTIONNAIRE ARCHIVE PAP ARCHIVE

Throughout the course, you were reminded of specific action steps you should take to complete your personalized action plan. Learn more about what specific action steps you will take as a result of taking this course.

1. As a result of participating in this course, indicate how likely you are to implement each of the financial behaviors below on a scale of 1 to 5 where 1 = not likely, 2 = possibly, 3 = likely, 4 = very likely, 5 = definitely.

Utilize the budget you developed

Implement strategies to improve your credit score

Reduce your debt

Pay your bills on time

Open and utilize a bank account

Save Save questionnaire responses

- Complete the personalized action plan and select 'Save'

Personalized Action Plan

QUESTIONNAIRE PERSONALIZED ACTION PLAN QUESTIONNAIRE ARCHIVE PAP ARCHIVE

Identify a specific task and target completion date for each action item

Save action plan responses

- Select the 'Questionnaire Archive' or 'PAP archive' menu to access previously completed questionnaires and action plans

Questionnaire Archive

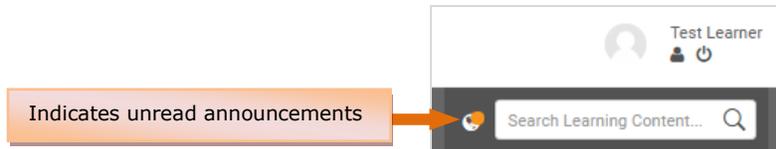
QUESTIONNAIRE PERSONALIZED ACTION PLAN QUESTIONNAIRE ARCHIVE PAP ARCHIVE

NUMBER OF SET	DATE	STATUS	COMPLETION DATE	VIEW
1	11/21/2017	Completed	11/21/2017	View

View/print completed action plans and questionnaires

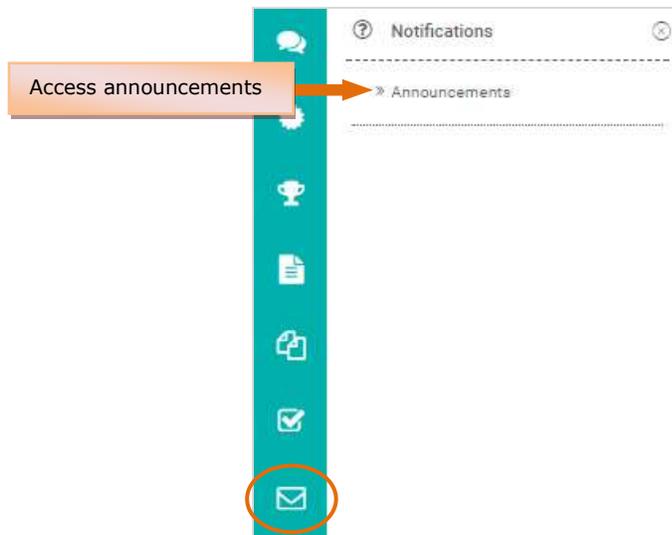
Notifications/Announcements

Program notifications alert learners to new information, promotions, reminders and financial tips. When unread announcements are present, the icon at the top right of the page will be orange.



To view announcements:

1. Select the 'Notifications' icon then select 'Announcements' to view all announcements



2. Use the action icons to delete or mark announcements as unread



TYPE	ANNOUNCEMENT TITLE	COURSE	MESSAGE	DATE	AUTHOR	ACTIONS
system	Enhanced ClearpointU platform		The enhanced ClearpointU platform is mobile friendly with lots of exciting new features! login at http://learn.clearpointu.org today!	1:10 pm, TT Mon, 2017	Admin User	X U

Delete or mark as unread