Personalized Learning Program Participant User Guide

Table of Contents

# 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.
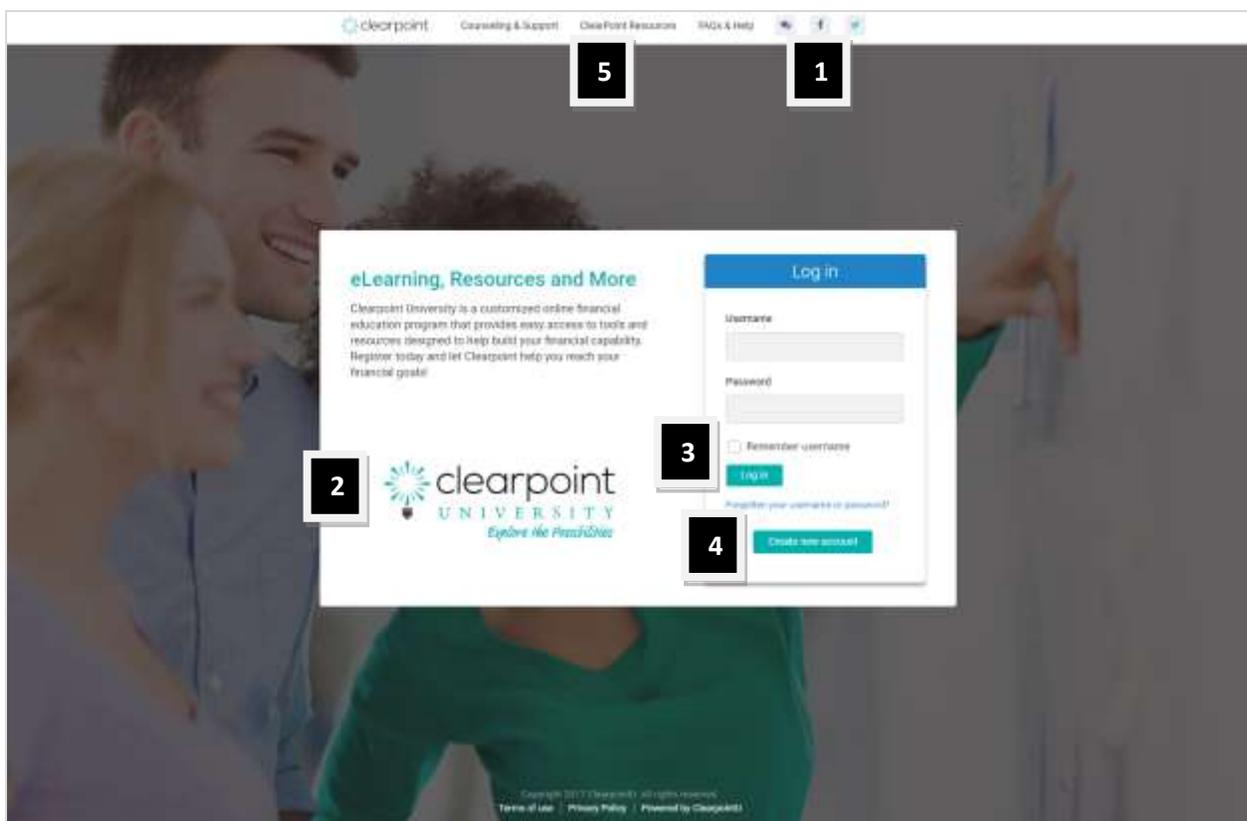
1 – Click to connect via chat or social media, if applicable

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
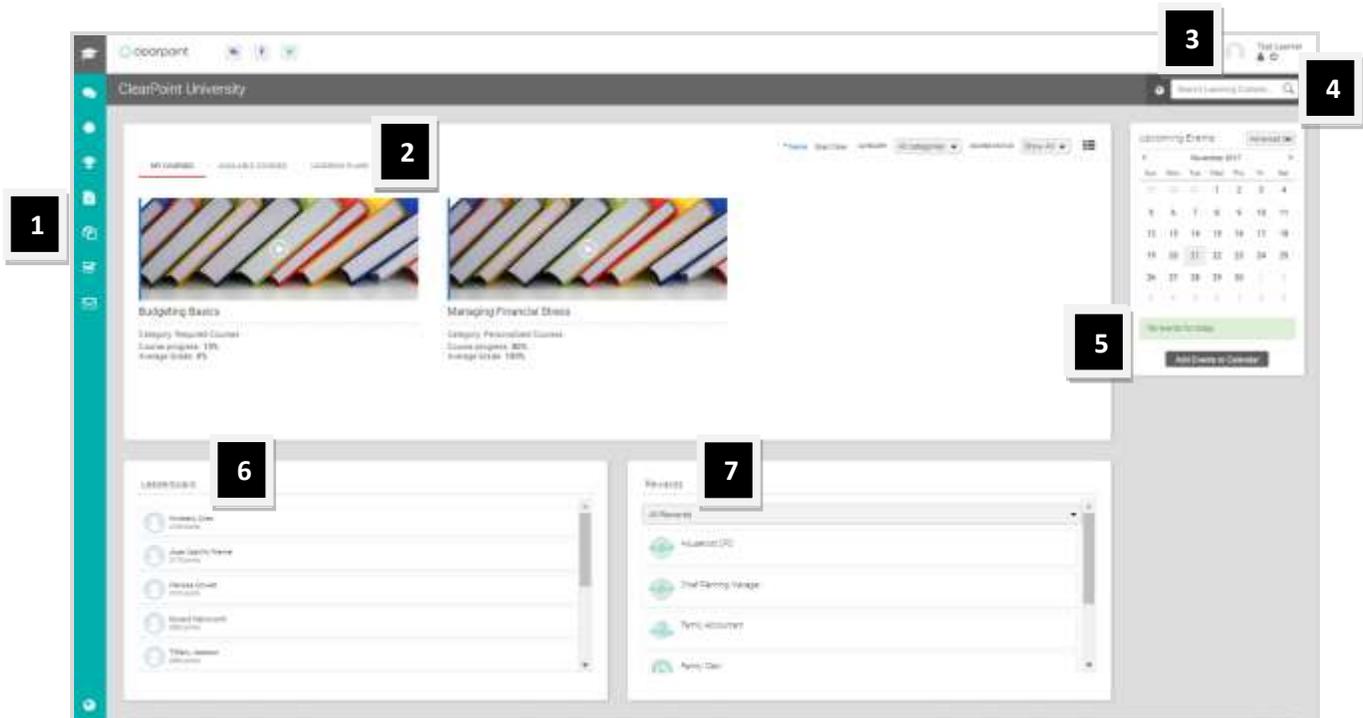
1 – Access side bar menu items

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
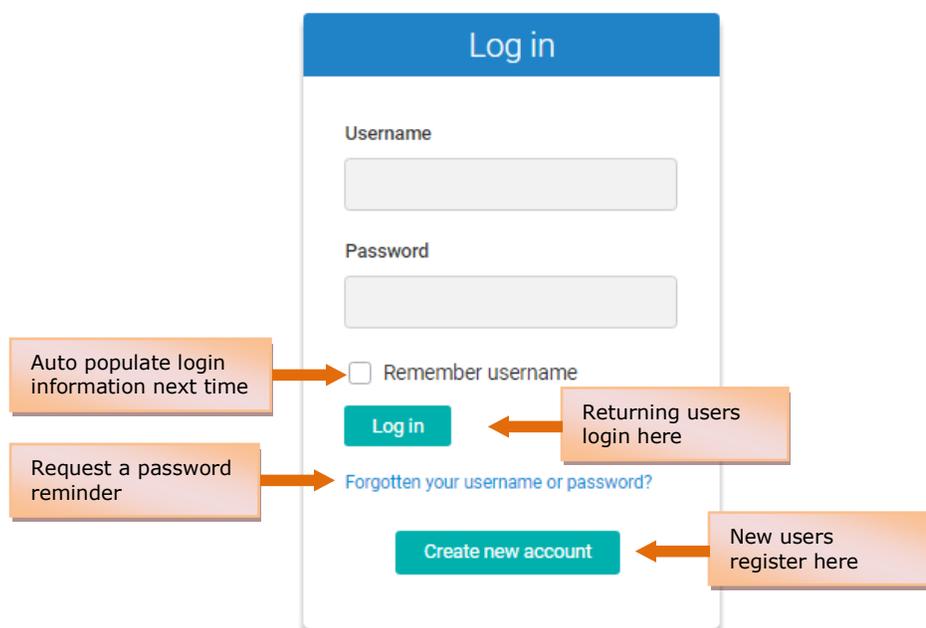
To register from the landing page:

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:

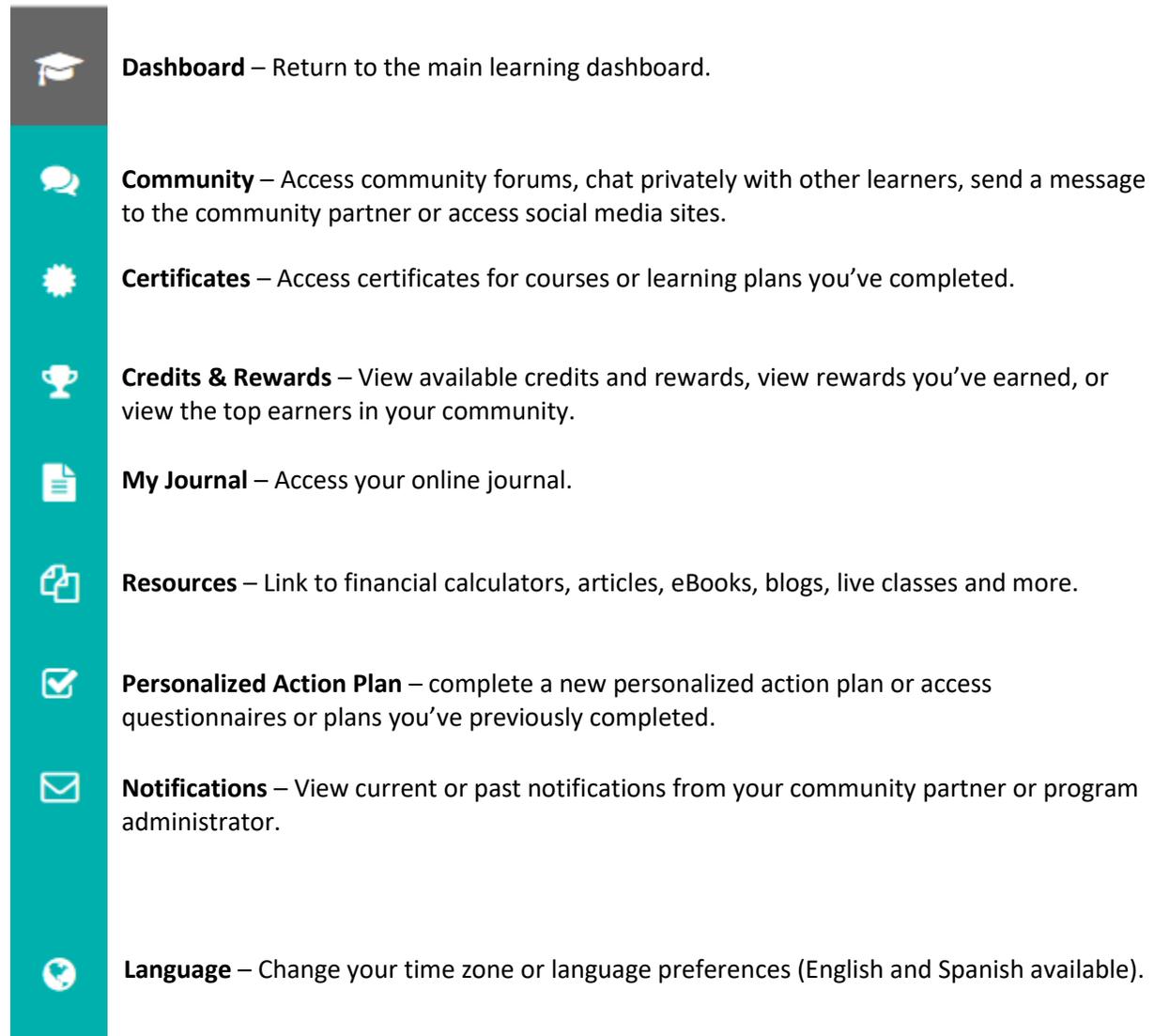1. Click the 'forgotten your username or password?' link. The password will be sent to the email address on file.

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).
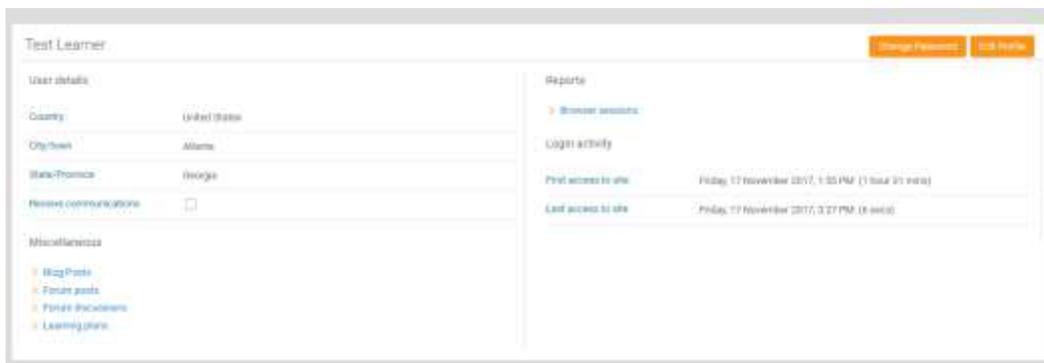
Update Profile Information and Opt In/Out

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 avitars 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.
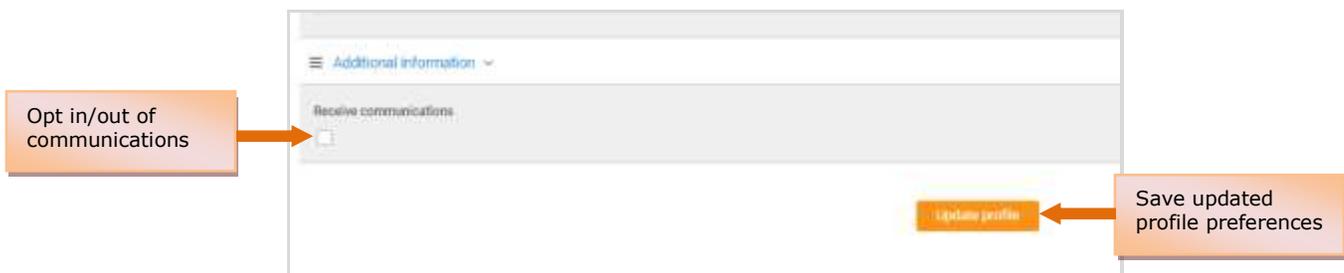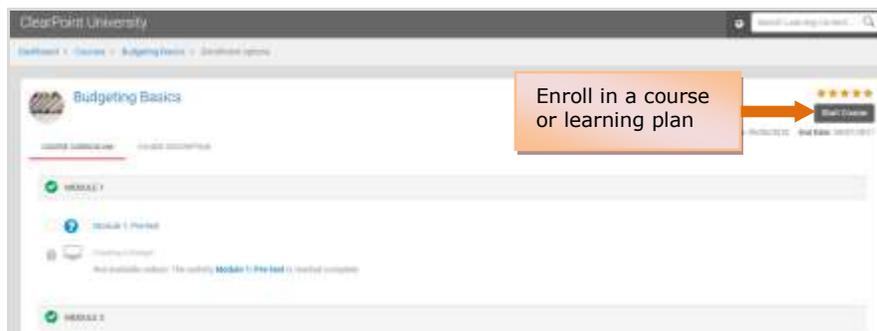
Enroll in Courses and Learning Plans

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
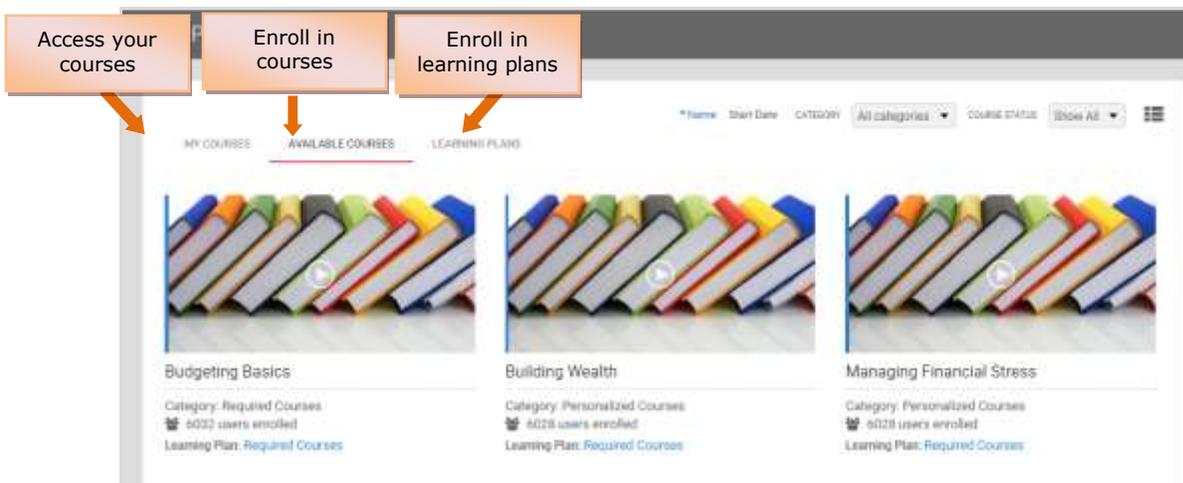
Intake and Exit Assessments

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 'Sumbit Survey' icon to complete the intake assessment

   o The intake assessment can be completed only one time

   o The exit assessment will be available <u>only</u> after all ClearpointU courses and activities are complete and should launch automatially

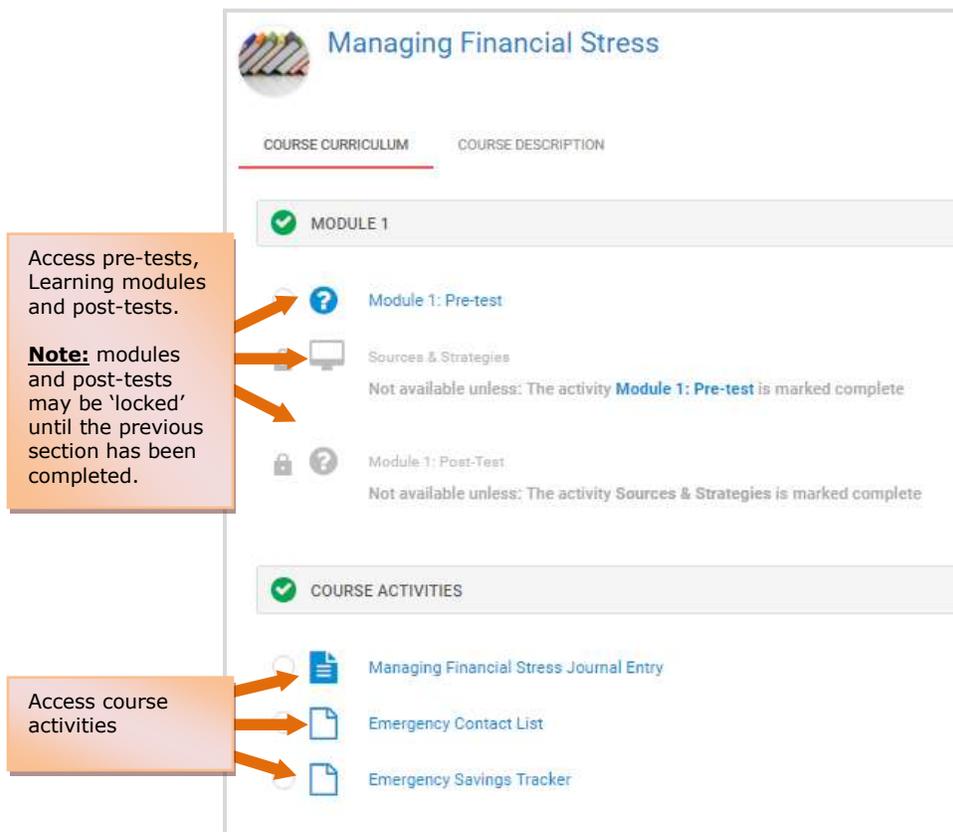![clearpoint - A DIVISION OF MONEY MANAGEMENT INTERNATIONAL]

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

Access course contents

Managing Financial Stress

Category: Personalized Courses
6028 users enrolled
Learning Plan: Required Courses

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

Managing Financial Stress

COURSE CURRICULUM   COURSE DESCRIPTION

✓ MODULE 1

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

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

Module 1: Pre-test

Sources & Strategies
Not available unless: The activity **Module 1: Pre-test** is marked complete

Module 1: Post-Test
Not available unless: The activity Sources & Strategies is marked complete

✓ COURSE ACTIVITIES

Access course activities

Managing Financial Stress Journal Entry

Emergency Contact List

Emergency Savings Tracker

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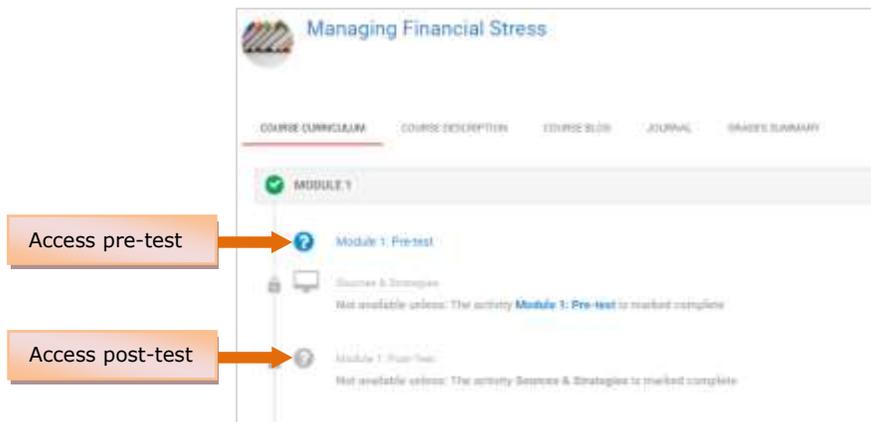
2. Follow the prompts to answer questions and submit responses. A review of responses and correct answers will launch automatically, as shown below.
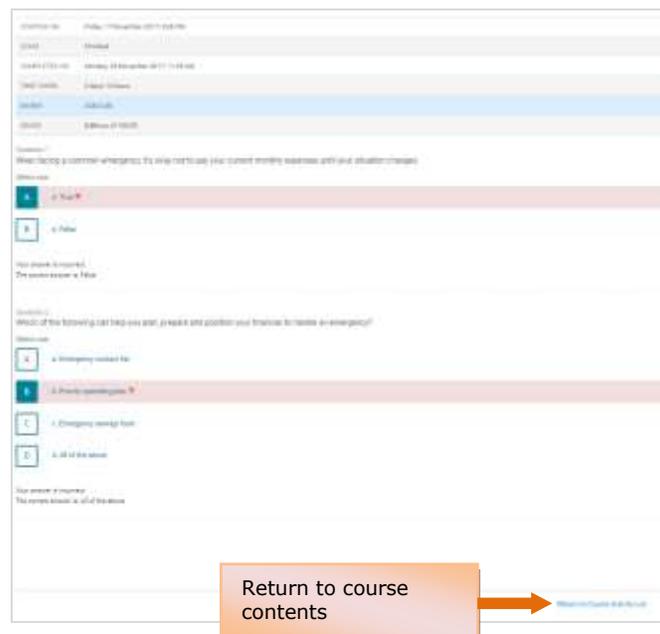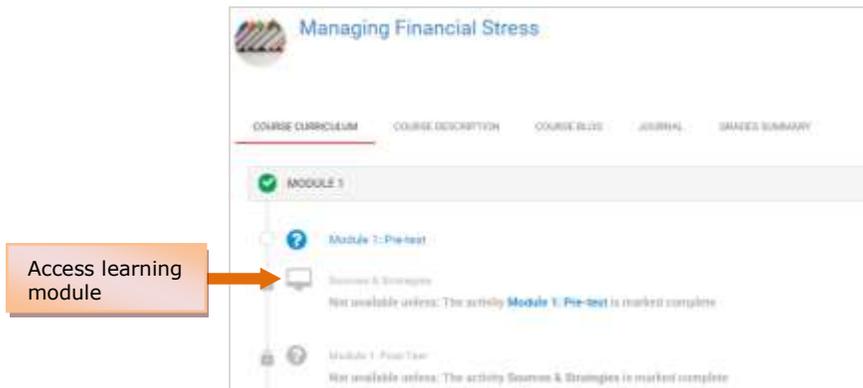
Learning Modules

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.
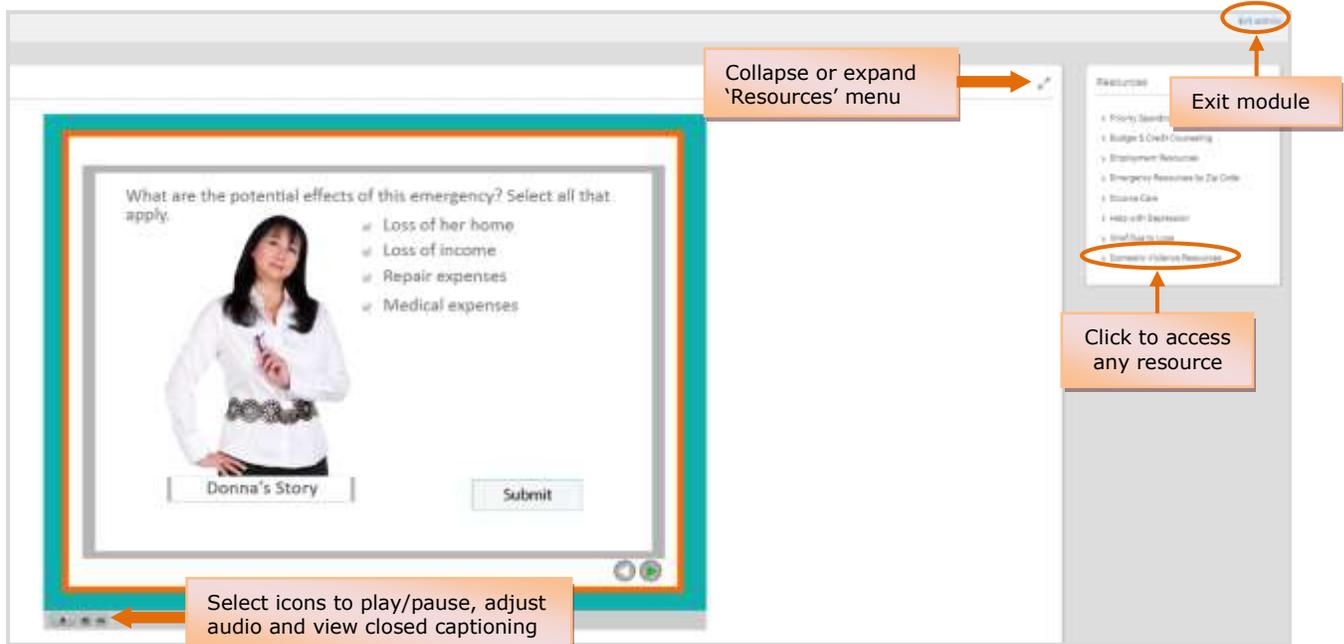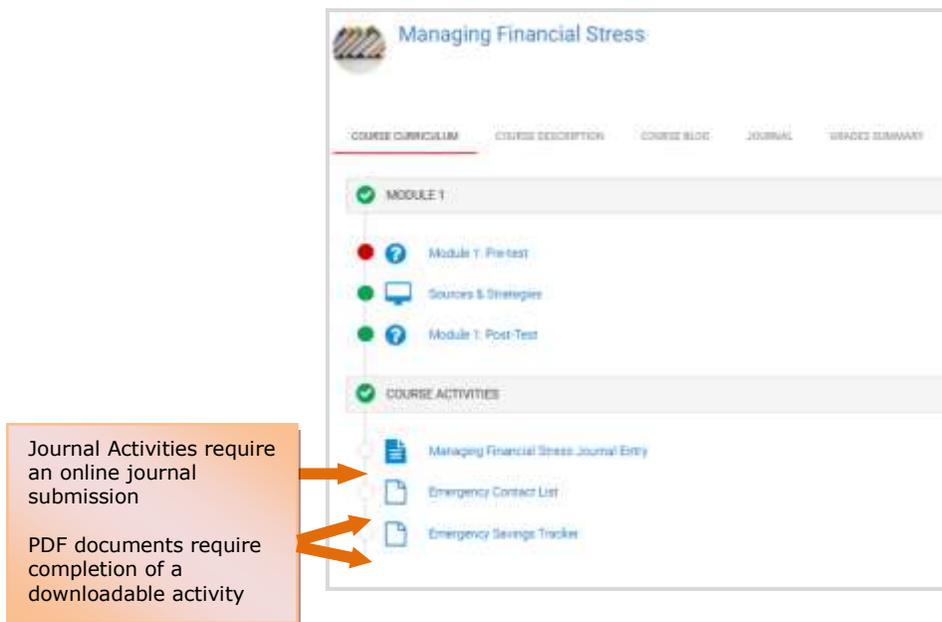
Course Activities

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

Add a journal entry

Edit/delete an entry

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:

   o Course Curriculum – view contents of a course

   o Course Description – view a brief course overview

   o Course Blog – create a new course post or respond to an exiting post

   o Journal – view/edit course journal entries previously created

   o Grades Summary – view a summary of completion attempts and grades
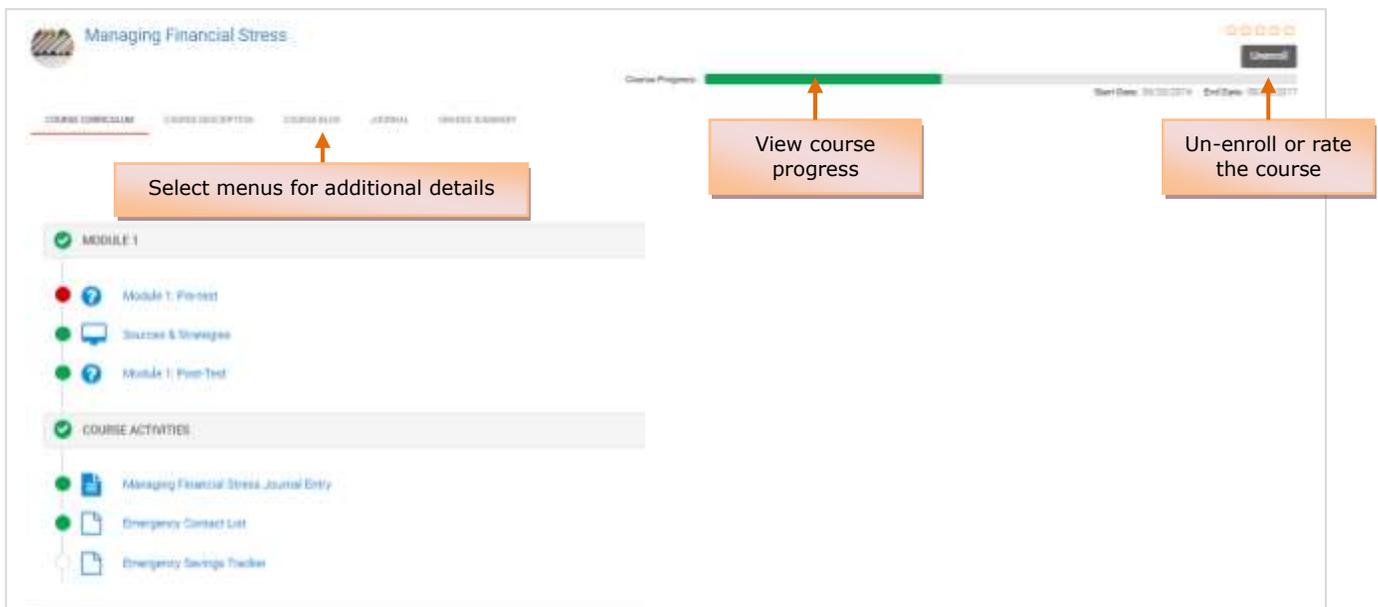
2. View the course timeline for the status of tests, modules and activities

   ○ 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:
   - o   Forum – interact with all learners by creating a new post or replying to an existing one
   - o   Chat – chat privately with other learners in the community
   - o   Talk to us – send a private message to the community partner or administrator
   - o   Facebook/Twitter/YouTube – access social media sites
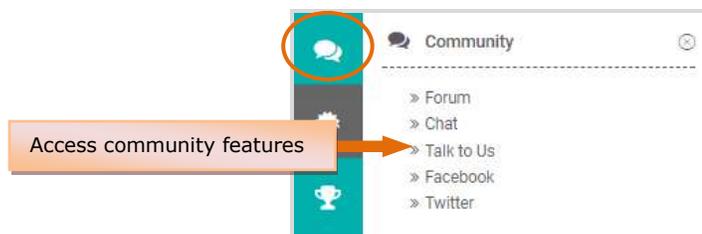
Certificates

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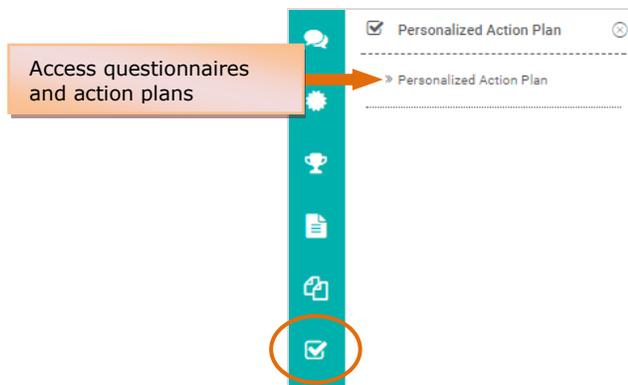
2. Complete the questionnaire and select 'Save' to access the personalized action plan

Save questionnaire responses

3. Complete the personalized action plan and select 'Save'

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

Save action plan responses

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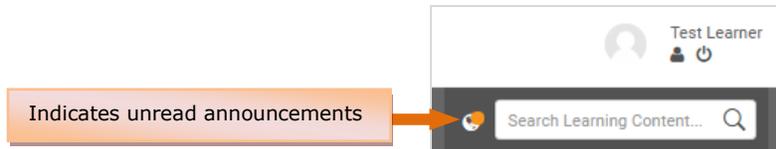

View/print completed action plans and questionnaires

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.

Indicates unread announcements

To view announcements:

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

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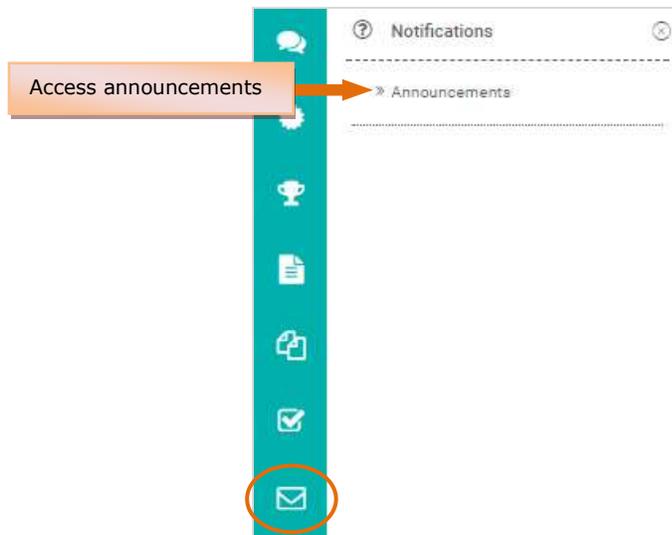
2. Use the action icons to delete or mark announcements as unread

Delete or mark as unread