Quick Start Guide for Advisors

This guide is for non-restricted users.

Quick Start Guide for Advisors

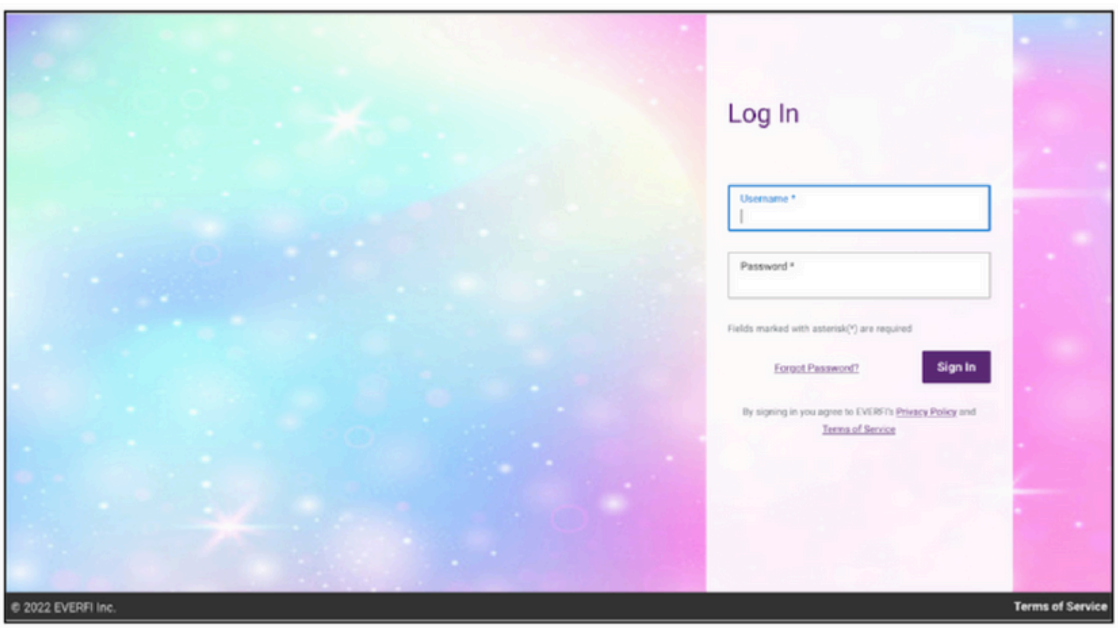
This guide will make sharing this financial education with your clients and their families fast and simple. Let's get started!

Overview

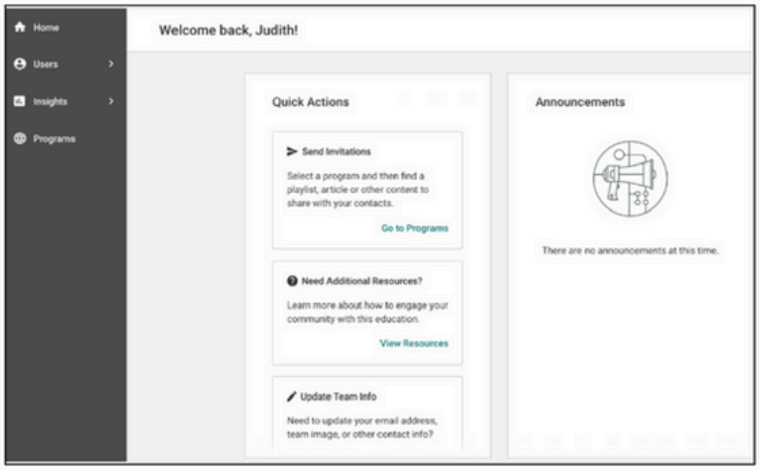
Your organization was designed to help you grow and deepen relationships with clients and their families. Through a simple online tool, you can invite clients, prospects and their families to engage in a series of customized, interactive financial education courses designed to educate and empower families to work together toward their financial goals. Your organization has partnered with EVERFI, a leading education technology company, to provide this program to our clients and prospects.

Step 1: Access the Platform and Log In

Once you have received your invitation to access in your email inbox, you can log in.

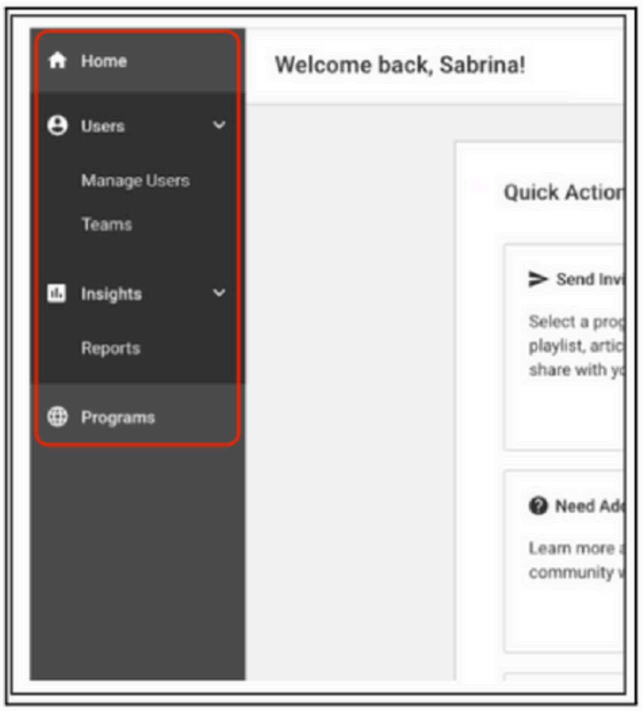


Step 2: Get Familiar With Your Tools: Access the Advisor Dashboard



Home Page

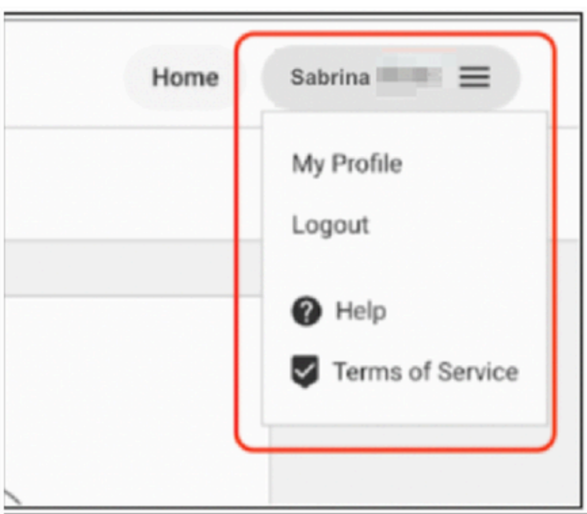
The *Home* page for Advisors is a dashboard that provides easy access to quick actions, like seeing your programs, viewing resources, and updating your teams' information.



Navigation Bar

On the left side of the screen, you will see a navigation bar with a menu of links:

- **Home** - Quickly access your programs, see resources specific to your organization, and edit team information.
- **Users** - Manage users and teams
- **Insights** - View any data reports available to you
- **Programs** - View learning content and send invitations

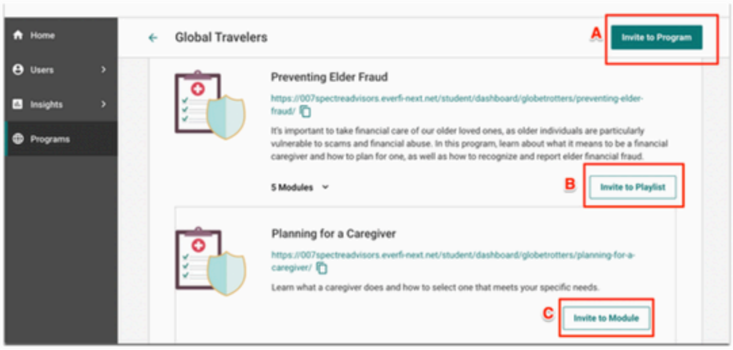


Header User Bar

In the top right corner of the platform is your *user chip*. Select your *user chip* to access:

- **Your Profile** - view and update profile & password
- **Logout**
- **Help Page** - Access to resources on Help topics
- **Terms of Service Page - Access EVERFI's User Terms page**

Step 3: Send Out Invitations to Your Learners

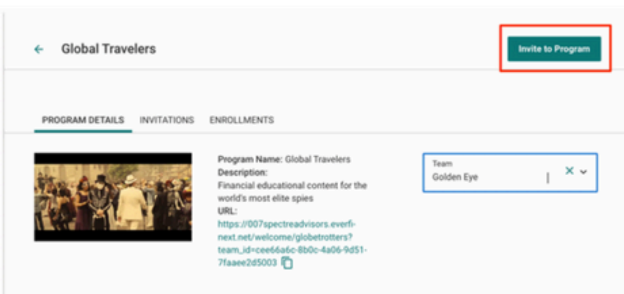


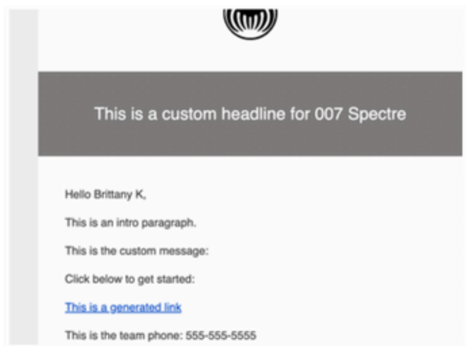
Once you've identified which content you'd like to send, you can send an invitation easily through the platform. First, choose the level at which you'd like to send the invitation:

- **Program**: sharing the program in its entirety
- **Playlist:** sharing a curated list of modules selected and pre-approved
- **Module:** sharing individual topics each selected and pre-approved

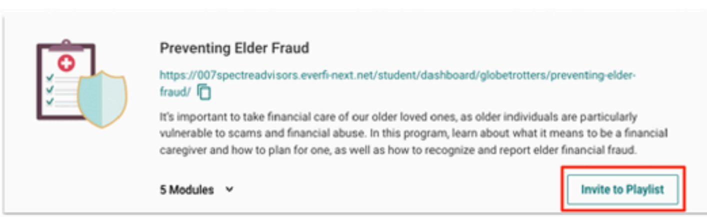
Sending an invitation at the program level will direct your clients to the general program landing page, where they'll be able to see and explore all topic areas. If your client has specific needs or interests, you can send a link to a specific topic area, known as a playlist, or even an individual module within a playlist.

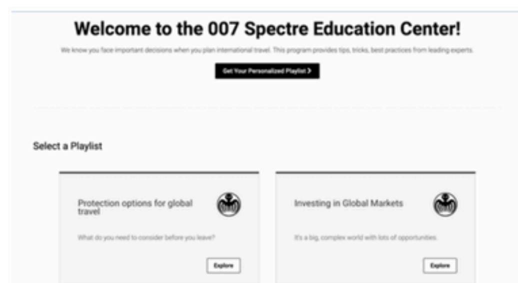
(A) To send an invitation at the Program level, which is the most general level, click the dark *Invite to Program* button in the top right corner of the program detail page. Your client will receive a link to the program landing page to explore at their own interest:



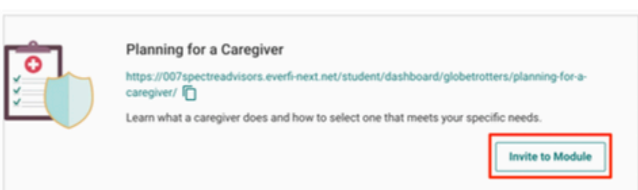


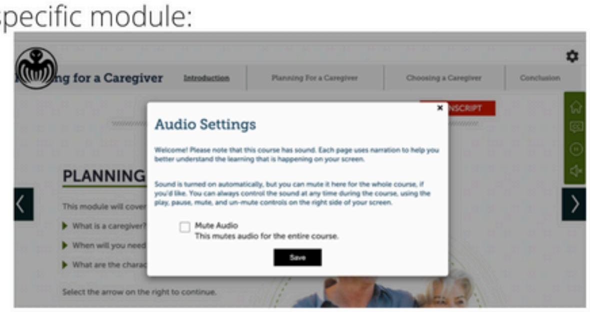
(B) To send at the Playlist level, which is a grouping of modules in a single topic area, click the light *Invite to Playlist* button on the bottom right of the individual playlist. Your client will receive a link to the specific playlist:



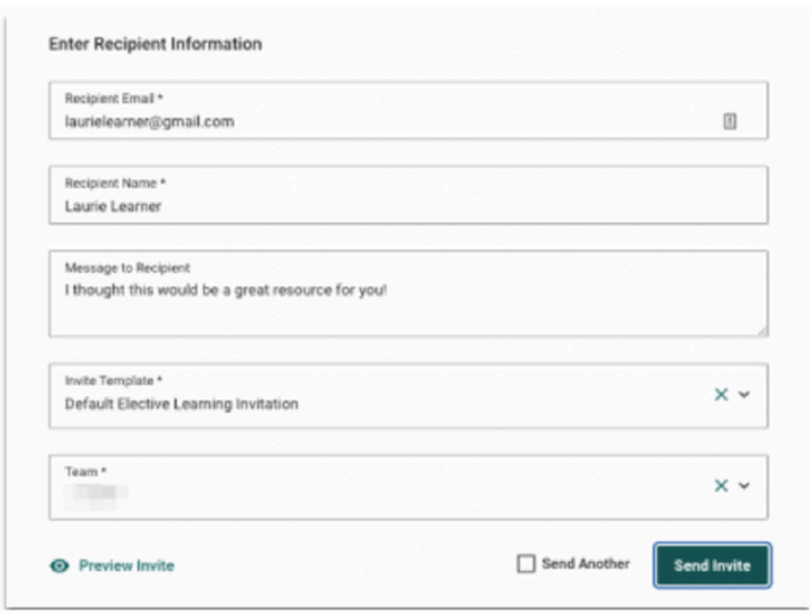


(C) To send at the Module level, which is the most granular level, expand the playlist summary by clicking the link that says "# Modules," and then clicking the light *Invite to Module* button to the right of the desired module. Your client will receive a link to the specific module:





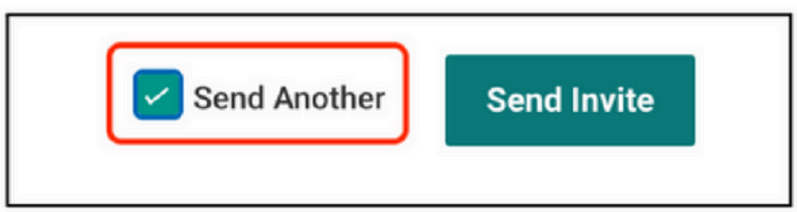
After clicking the *Invite* button, you will be taken to the *Send Invite* page. Fill in the required fields.



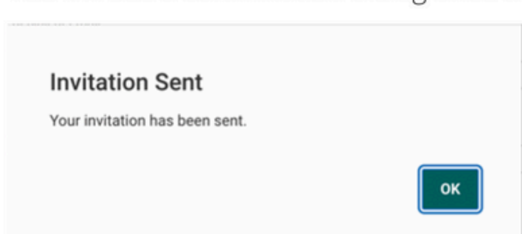
- **Recipient Email (required):** Your client's email address. Note that you can only specify one recipient at a time.
- **Recipient Name (required):** Your client's name.
- **Message to Recipient:** An optional, personalized message to your client.
- **Invite Template (required):** Select the invite template you would like to use to email your client.
- **Team (required):** Select your team you are sending the invitation on behalf of

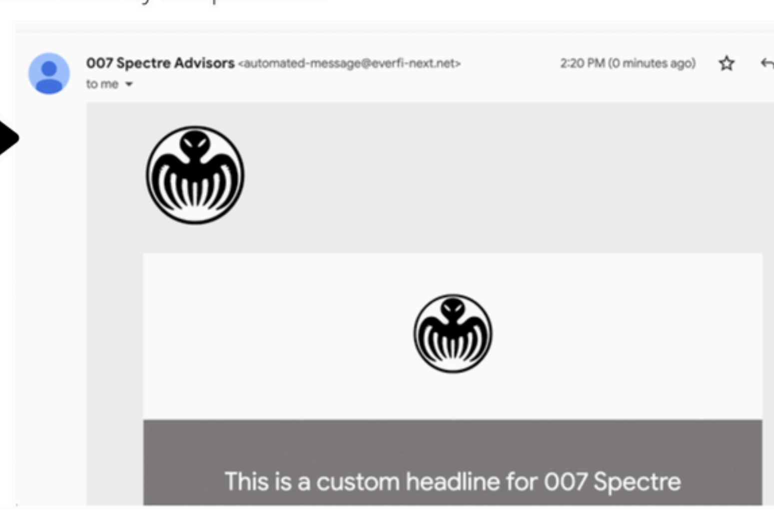
Click *Preview Invite* in the bottom left to see an approximation of what the email will look like to your clients.

If you only need to send an invite to one client, you can go ahead and click the *Send Invite* button in the bottom right of the form. If you would like to send the same invite to more than one client, select the *Send Another* checkbox before clicking *Send Invite*, which will populate the form again using your previous inputs.



You will see a confirmation dialog once the email has been sent by the platform.

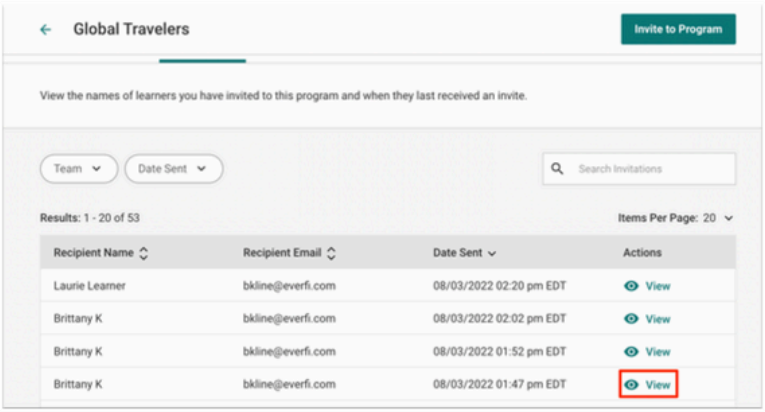




Step 4: Check Enrollments and Track Client Engagement

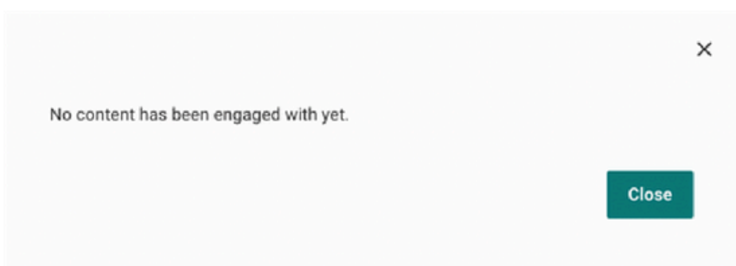
There are two reports included on the platform that will help you track enrollment and client engagement:

- **The Invitations Tab:** Located on the Programs Page, the Invitations tab shows a list of all the invitations that have already been sent by your team, who they were sent to, and the date and time each invitation was sent. Click the *View* link in the *Actions* column to see who has engaged with the invitation.

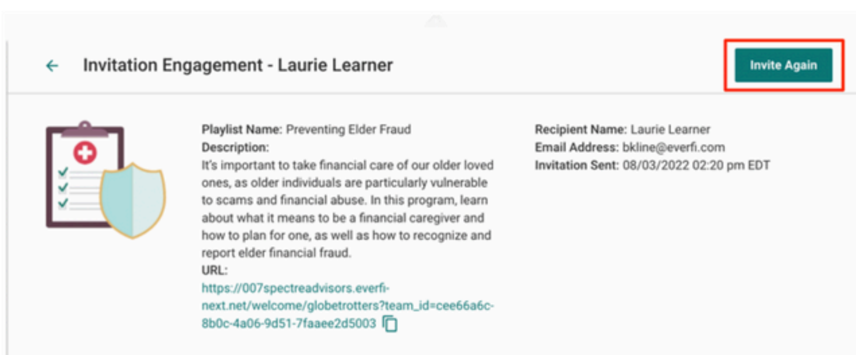


Each row in the table represents a clickthrough to the content from the link sent in the email invitation.

- If the First and Last Name is blank, it means the recipient clicked through to the content but *did not* register. Instead the Registration Date shows the date they visited the link.
- If the First and Last Name has a value, it means the recipient registered for an account. The Registration Date shows the date they registered, and the Last Login date shows the date they last logged into their account.
- To see what learning content the visitor has interacted with, click the *View* action under the *Content Engaged With* column.
- If the learner only visited the landing page but did not click through to any learning content, the system will report that no content has been engaged with yet.



To resend the invite, click the *Invite Again* button in the top right corner. This will take you to the Send Invite page prefilled with all of the fields from the original invitation. After you click Send, a new row will be created in the Invitation Engagement table.



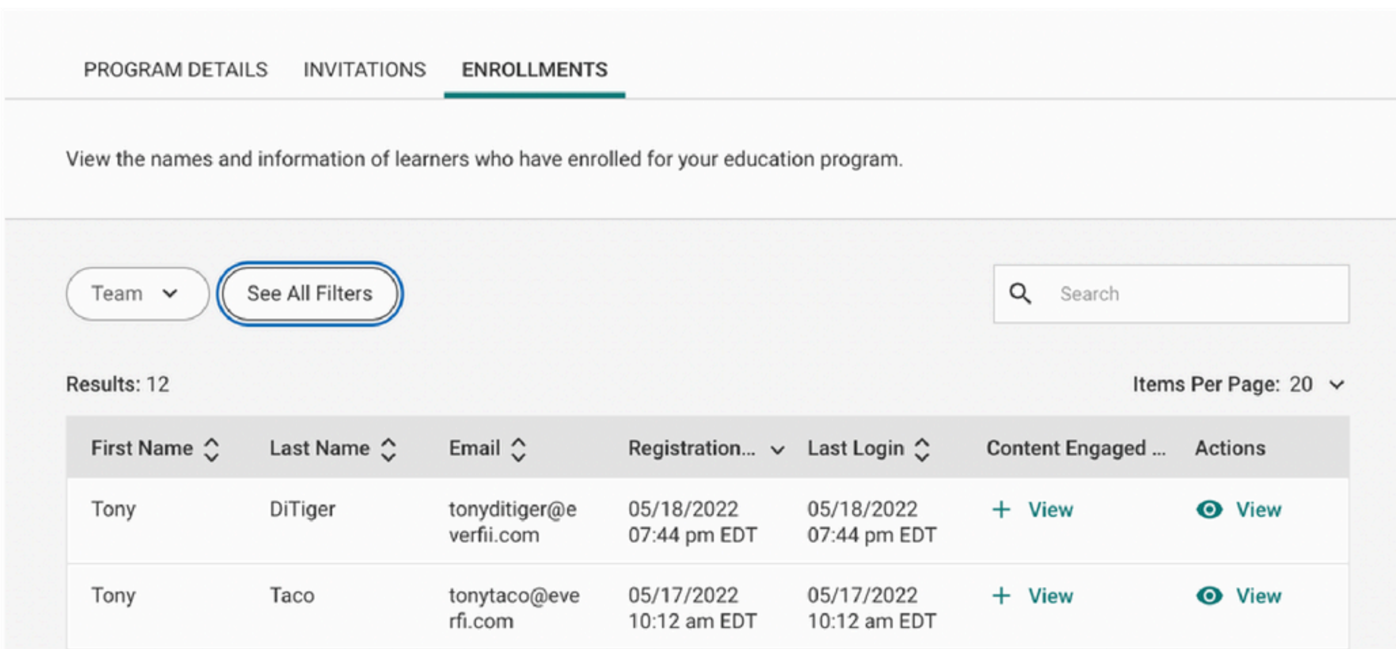
- **The Enrollments Tab:** The Enrollments tab shows a list of all learners who have registered for the program through an invitation sent for your team.

Each row represents a registered learner, and you will be able to see their First Name and Last Name, Email Address, Registration Date, Last Login Date, and any content that the learner has interacted with.

To see what specific content the learner accessed, click the View action under the Content Engaged With column.

If the learner only registered for the program landing page but did not click through to any learning content, the system will report that no content has been engaged with yet.

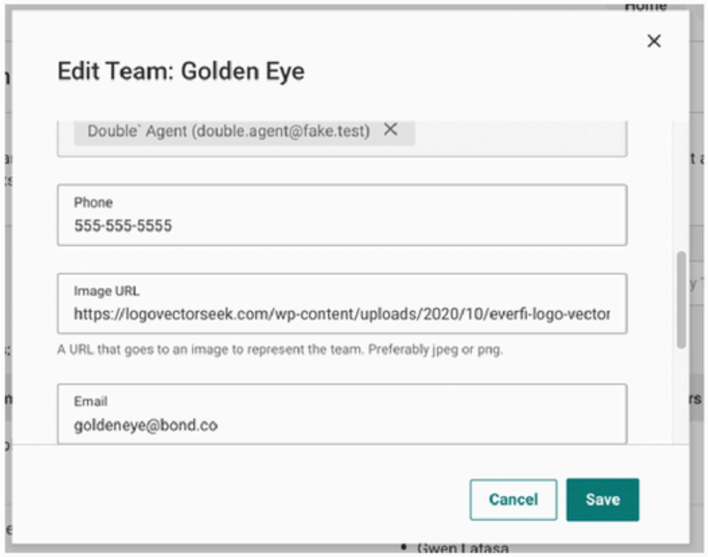
To see the User Detail page for that learner, click the View link under the Actions column.



Troubleshooting and Support

Q: What are the guidelines for adding an image URL?
A: An Image URL is a URL that goes to an image to represent the team. While the image file can be hosted on any public website, we recommend using the photo on your team website. You can do this by:

1. Navigating to your team website, right clicking the photo, and selecting 'copy image address'.
2. Go to the *Home* page on your Advisor dashboard and select 'Update Team Info'.
3. Select the pencil icon to edit your team information and paste the Image URL.
4. Be sure to click 'Save'.



Note: JPEG and PNG images should be 230 x 235px or a 16:9 dimension ratio. Team images will be sized responsively if they don't meet the requested size. Image will size as appropriately as possible. The image may distort/pixilate.

Q: How do I receive support when myself or a member of your team experience issues when registering for the program?
A: Should you have any questions or run into any issues, please contact our support desk at https://help.everfi.com/s/contactsupport or reach out to your Account Manager directly.

Q: How can Advisors access the module content ourselves?
A: We recommend that you send an invitation to your personal e-mail and access the platform from there. This will give you the same program view as your client(s).

Q: Can I send the invitation through Outlook or my phone?
A: No. All invitations must be sent through the Advisor Dashboard. The Advisor Dashboard tracks the invitations you send, which clients register for the courses, and the types of modules their family members enroll for, all important information to help you with follow-up conversations.

Q: Do my clients have to enter a lot of personal information to use the site?
A: Users are asked to enter a first name, last name, email address, and password. Those individuals will be rolled up under the main household name so that you, as the Financial Advisor, will be able to identify each user.

Q: Is there a limit to the number of family members a client can request to be added to the EverFi program?
A: No. In fact, the original recipient of the invitation can forward the email to as many others in his/her household as they want and that recipient can register for the learning on their own.

Q: What are some best practices to encourage clients and their family members to complete the modules?
A: There are many ways to encourage clients and their families to complete modules. Many Advisors find that times of transition, such as a client going away to college, can be a good time to bring up the conversation. Some families with younger children take an approach connecting receiving allowance with finishing the modules. We suggest adding an agenda item on follow-up meetings to discuss things that were learned in the course(s).