



HEFWA

Higher Education Financial Wellness Alliance

COUNTDOWN TO THE NEW CASHCOURSE

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WELCOME & LOGISTICS



1 Stay Muted and Keep Video Off

Everyone is muted and with their video off upon entry. You may be invited to unmute yourselves during discussions.

2 Questions?

If you have questions put them in the chat and we will communicate your questions to the speakers throughout the session.

3 Tech Support

If you are experiencing any technical issues during this workshop, please send the host a private message via the chat box.

HEFWA UPDATES





HEFWA SUMMIT

20
25

UNIVERSITY OF UTAH

JULY 13 - 16

Register by May 30 to lock in the regular conference rate!



BASIC NEEDS SUMMIT

THE UNIVERSITY OF UTAH
SALT LAKE CITY • JULY 16, 2025



Trellis
Strategies



SAVE THE DATE: FREE WEBINARS



June 12, 2-3:30 p.m. ET

Live! The 2025 Survey of Financial Wellness Programs in Higher Education

Join your peers across higher education for a 90-minute interactive session to share insights, benchmark your program, and contribute to national data on financial wellness efforts. Participants will receive full, anonymized survey results to support program development and funding.

RECENT HEFWA RESEARCH BRIEFS



Special Series: Financial Wellness Websites In Higher Education

January: How are Financial Wellness Websites in Higher Education Named?

February: What is Higher Education Including on their Websites for College Students?

March: Artificial Intelligence and Financial Counseling: Do Institutions of Higher Education Embed Chatbots in their Financial Websites?

TODAY'S WEBINAR



THE NEW CASHCOURSE



CASHCOURSE UPDATES

1 Simplified navigation and more student-friendly experience

Easier access to lessons and resources reduces frustration, boosts engagement, and ensures seamless learning.

2 Improved design and interactivity to maximize engagement

3 Updated, relevant content for real-world application

4 Enhanced reporting and personalized learning insights



CASHCOURSE UPDATES

1 Simplified navigation and more student-friendly experience

2 Improved design and interactivity to maximize engagement

Engaging visuals, videos, and activities make learning enjoyable, improving comprehension and retention.

3 Updated, relevant content for real-world application

4 Enhanced reporting and personalized learning insights



CASHCOURSE UPDATES

1 Simplified navigation and more student-friendly experience

2 Improved design and interactivity to maximize engagement

3 Updated, relevant content for real-world application

Timely, expert-vetted content keeps students informed and prepared for real-world financial decisions.

4 Enhanced reporting and personalized learning insights



CASHCOURSE UPDATES

1 Simplified navigation and more student-friendly experience

2 Improved design and interactivity to maximize engagement

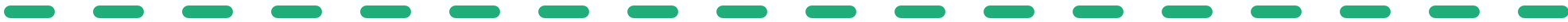
3 Updated, relevant content for real-world application

4 Enhanced reporting and personalized learning insights

Improved tracking helps schools measure engagement, while students gain insights into their progress.



BEFORE AND AFTER



Log In



CASHCOURSE

YOUR REAL-LIFE MONEY GUIDE

We teach financial skills that make sense in the real world.



Students

CashCourse is your guide to making informed financial choices. [register for a free account](#) to find your assignments and other financial tools and start taking charge of your money.



School Administrators

If your school is already enrolled in CashCourse, [log in](#) with the username and password your Administrator provided you, or [click here for more information on how to get started](#).



Other Learners

If you aren't affiliated with a college or university, you can still register for CashCourse. [Create a free account](#) and get access to all of CashCourse's great resources.

Already registered? [Log In here](#).



CashCourse teaches practical skills that help students take control of their financial future. [Learn more.](#)

[Forgot Password?](#)

Log In

New Here? [Register now!](#)

School Admin?

Need Help?



CASHCOURSE
YOUR REAL-LIFE MONEY GUIDE

Search

TOPICS: Earn | Save & Invest | Protect | Spend | Borrow | Pay for Education

Dashboard

▶ Dashboard

My Assignments

My Activity

Topics

Financial Tools

Financial Experts

Contact Us

My Assignments

[View Assignments](#)

See what assignments your instructor or school administrator has assigned to you, and complete them by the due dates.

Financial Tools

[View All](#)

Find online coursework, calculators, the Budget Wizard, worksheets, quizzes, and articles to increase your financial knowledge.

My Activity

[View All Activity](#)

View the scores you've earned on assignments, find the articles you've saved, and access your budgets.

Financial Experts

[View All](#)

Find the answers to common financial questions, or ask a question yourself.

LIVE DEMO!



NEW STUDENT ONBOARDING





KEY TERMS AND DEFINITIONS

1 Module

Self-contained unit that contains lessons, exercises and assessment.

a.k.a. Course

2 Access Code

4-digit code that is unique to a group of students within your school.

a.k.a. Registration Code


3 Group Tag

Custom identifier used to filter reports to view a specific population.

a.k.a. Groups



NEW USER REGISTRATION


 **CASHCOURSE**

School Name Goes Here

Additional Information Goes Here

Quick Start Registration

Scan the QR Code and follow the on screen instructions to access CashCourse personal finance modules.



PLACEHOLDER

Step-by-Step Registration

1. Go to **CashCourse.org**.
2. Click **Register Now!**
3. Select **Yes, I have a code** and enter the 4-digit access code at the bottom of this list.
4. Provide your name and email address.
5. Verify your account.
6. Pick a username. You can make up your own or use the prepopulated suggestion.
7. Click the **Let's Get Started!** play button.

Access Code: XXXX

Multiple ways to onboard new users:

- Scan QR Code
- Custom URLs
- Access Codes

Access codes (URLs and QR codes) are also used to apply group tags to user.



UNIQUE TO EACH CODE

Email Domain

Do you want students to register using their school email address?

StudentName@domain.edu

1



Student ID

Do you want to collect student ID as part of the registration process?

Custom help text available.

2

Group Tag

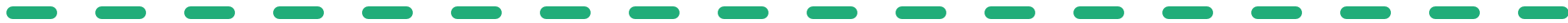
What label do you want to use to enable report filters to view this group of students.

Examples:

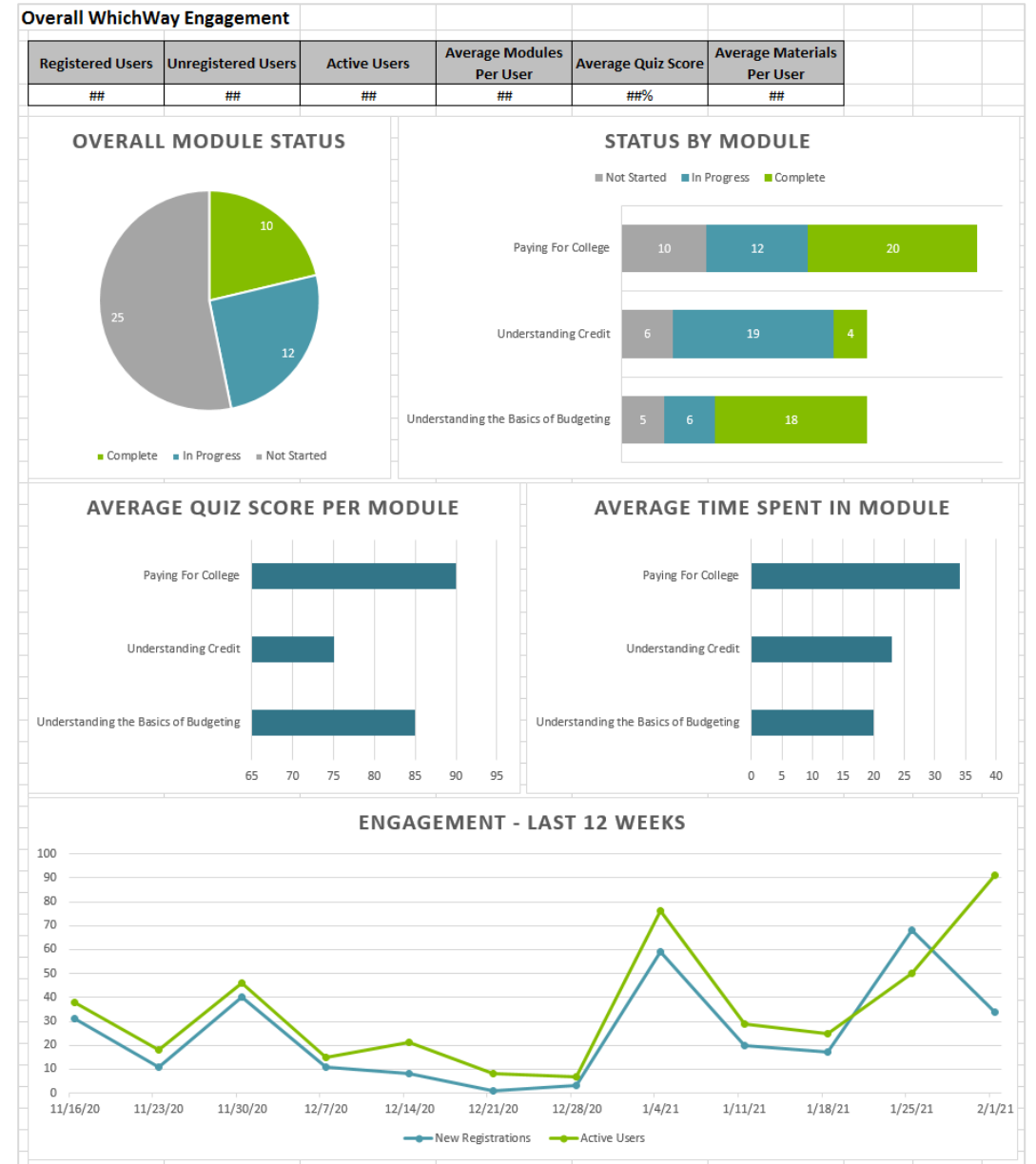
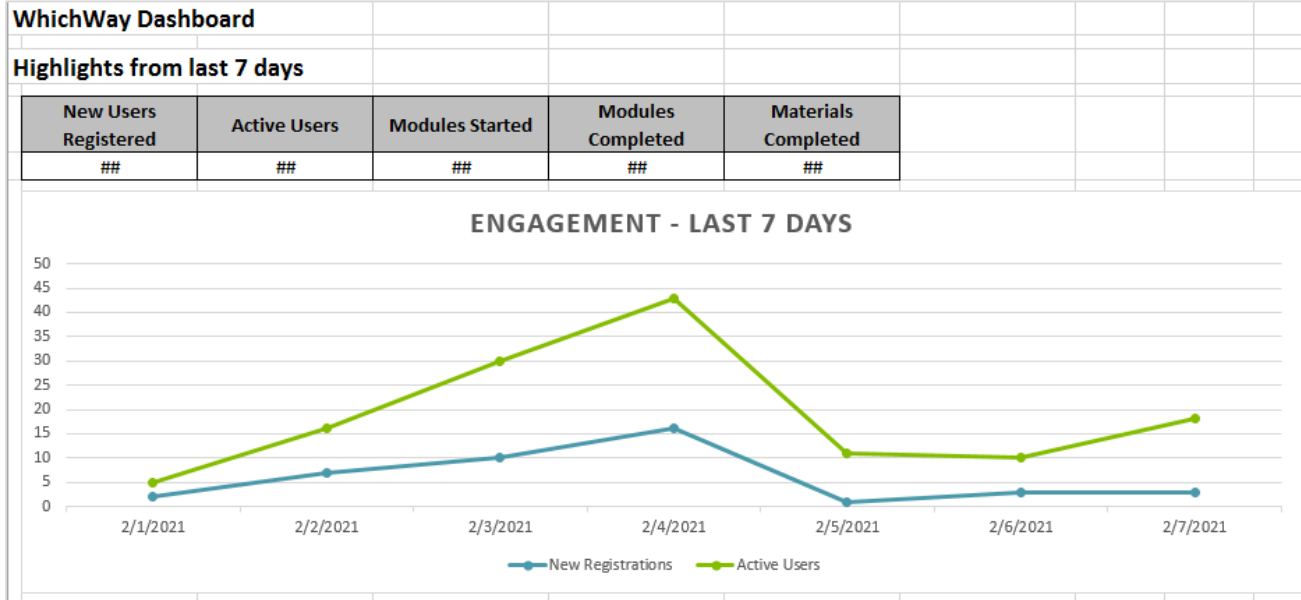
- Orientation
- FYS or FYE

3

SCHOOL REPORTS



ENHANCED REPORTS



ENHANCED REPORTS

REGISTERED

First Name	Last Name	Email Address	External ID	Tags	Invitation Date	Registration Date	Last Login Date	Last Action Date	Modules In Progress	Modules Completed	Materials Completed	Understanding The Basics Of Budgeting	Achieving Goals
Omar	Amey	oamey@school.edu	WA7891234	FYS	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46	0	11	50	Completed	Completed
Oscar	Babaahmady	obabaahm@school.edu	W98765432	SAP	3/20/2020 14:18	3/20/2020 14:18	3/20/2020 14:18	3/20/2020 14:18	3	1	14	In Progress	In Progress
Jordan	Barcikowski	jbarciko@school.edu	WA3456789	FYS; SAP	3/20/2020 11:59	3/20/2020 11:59	3/20/2020 11:59	3/20/2020 11:59	0	11	50	Not Started	Not Started
Jared	Castro	jcastr94@school.edu	W87654321	FYS	3/16/2020 12:41	3/16/2020 12:41	3/16/2020 12:41	3/16/2020 12:41	0	11	50	Completed	Completed
Yves	Chan	ychan80@school.edu	W43210987	FYS	3/15/2020 0:33	3/15/2020 0:33	3/15/2020 0:33	3/15/2020 0:33	2	0	6	In Progress	In Progress
Yana	Chen	cyujun@school.edu	W65432109	FYS	3/15/2020 0:22	3/15/2020 0:22	3/15/2020 0:22	3/15/2020 0:22	1	0	1	Completed	Completed
Caleb	Christensen	cchris18@school.edu	WA1234567	FYS	2/22/2020 18:20	2/22/2020 18:20	2/22/2020 18:20	2/22/2020 18:20	0	11	50	In Progress	In Progress
Jude	Crowell	jcrowell@school.edu	W89012345	SAP	2/22/2020 18:00	2/22/2020 18:00	2/22/2020 18:00	2/22/2020 18:00	1	40	40	Not Started	Not Started
Aidan	Dean	adean17@school.edu	W23456789	FYS; SAP	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46	0	0	0	Completed	Completed
Peter	Dehoyos	pdehoyos@school.edu	W56789012	FYS	3/20/2020 14:18	3/20/2020 14:18	3/20/2020 14:18	3/20/2020 14:18	0	11	50	In Progress	In Progress

MODULES

First Name	Last Name	Email Address	External ID	Tags	Module Name	Module Status	Module Quiz Score	Module Completion Date	First Action Taken	Last Action Taken
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding the Basics of Budgeting	Completed	100	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding Credit	Completed	76	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46
Oscar	Babaahmady	obabaahm@school.edu	W98765432	SAP	Understanding the Basics of Budgeting	In Progress			3/20/2020 14:46	3/20/2020 14:46
Oscar	Babaahmady	obabaahm@school.edu	W98765432	SAP	Understanding Credit	In Progress			3/20/2020 14:46	3/20/2020 14:46
Jordan	Barcikowski	jbarciko@school.edu	WA3456789	FYS; SAP	Understanding the Basics of Budgeting	Completed	98	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46
Jordan	Barcikowski	jbarciko@school.edu	WA3456789	FYS; SAP	Understanding Credit	Completed	55	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46
Jared	Castro	jcastr94@school.edu	W87654321	FYS	Understanding the Basics of Budgeting	Completed	80	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46
Jared	Castro	jcastr94@school.edu	W87654321	FYS	Understanding Credit	Completed	76	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46
Aidan	Dean	adean17@school.edu	W23456789	FYS; SAP	Understanding Credit	In Progress			3/20/2020 14:46	3/20/2020 14:46
Peter	Dehoyos	pdehoyos@school.edu	W56789012	FYS	Understanding Credit	Completed	55	3/20/2020 14:46	3/20/2020 14:46	3/20/2020 14:46

MATERIALS

First Name	Last Name	Email Address	External ID	Tags	Module Name	Material SKU	Material Name	Material Status	Material Completion Date	Quiz Score	First Action Taken	Last Action Taken
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding the Basics of Budgeting	0101-L01	Determining Income	Completed	3/20/2020 14:46	100	3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding the Basics of Budgeting	0102-E01	Calculate Take Home Pay	Completed	3/20/2020 14:46		3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding the Basics of Budgeting	0103-E02	Determine Your Monthly Income	Completed	3/20/2020 14:46		3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding the Basics of Budgeting	0104-L05	Balancing Income & Spending	Completed	3/20/2020 14:46	80	3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding the Basics of Budgeting	0105-E03	Needs Vs wants	Completed	3/20/2020 14:46		3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding the Basics of Budgeting	0106-L03	What's A Budget?	Completed	3/20/2020 14:46	80	3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding Credit	0501-L01	What is Credit	Completed	3/20/2020 14:46	80	3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding Credit	0502-E01	The Cost Of Credit	Completed	3/20/2020 14:46		3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding Credit	0503-L02	How Credit Works	Completed	3/20/2020 14:46	80	3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding Credit	0504-E02	Types Of Credit	Completed	3/20/2020 14:46		3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding Credit	0505-L03	What To Know When Using Credit	Completed	3/20/2020 14:46	100	3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding Credit	0506-E03	Before You Borrow	Completed	3/20/2020 14:46		3/20/2020 14:46	3/20/2020 14:46
Omar	Amey	oamey@school.edu	WA7891234	FYS	Understanding Credit	0506-E03	Credit Card Marketing Strategies	Completed	3/20/2020 14:46		3/20/2020 14:46	3/20/2020 14:46

REPORT UPDATES COMING IN JUNE

1 Module Survey Results

2 Budget Wizard

3 Worksheets Downloaded

4 Articles Viewed



STEPS TO PREPARE



KEY DATES AND DETAILS



New version coming June 23, 2025

- Onboarding request form available June 2.
- Access to the current CashCourse site will end on June 9.

Items to Note with Initial Release

- No administration required by the school.
- Assignments are communicated outside of the system (E.G. email, website or LMS).
- A standalone version for Canvas won't be available with initial release.
- The transition to the new system will be a complete cutover – no previous site data will be transferred.
- New experience for onboarding and tracking students.

WHAT YOU'LL NEED TO SIGN UP

1. Institution & Contact Info

School name, website, and primary contact details.

2. How You Plan to Use CashCourse

The following will be asked to provide context to the CashCourse configuration team:

- Are you assigning it through classes?
- Offering it as a support resource or requirement?
- Any incentives for student completion?



WHAT YOU'LL NEED TO SIGN UP

3. Student Group Configuration

For each student group you'd like to track separately in reports:

- Group Name and Group Tag (used in reporting).
- Whether students should register using a school email domain.
- Whether to require a Student ID, and if so, what instructions students should see during registration.

These options allow you to track individuals and unique populations — like students in a course, TRIO program, SAP appeal process, or orientation group.

4. Weekly Reporting Setup

Choose who should receive usage reports and on which days. You may list multiple recipients from your institution.



QUESTIONS?





HEFWA

**Higher Education
Financial Wellness Alliance**