How to Sign Up for CashCourse

About CashCourse

CashCourse is a noncommercial, mobile-friendly financial education platform available to all **HEFWA institutional members**. It equips students with essential money management skills through self-paced modules, articles, tools and resources.

This guide walks you through how to sign up your institution and configure your school's access settings. Thank you for advancing financial wellness on your campus. We're excited to support your students through CashCourse!

What You'll Need to Sign Up

Plan ahead by preparing to complete the onboarding questionnaire (available on or before June 2). To inform your planning, please be sure to review **How CashCourse Access Codes Work**.

TIP: Start a document that includes the following details (which will be requested in the questionnaire).

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?

3. Student Group Configuration

You will need to provide the following 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.

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Steps to Sign Up for CashCourse

Complete **this sign-up form** (available on or before June 2) to help us configure your institution's account so you're ready to deliver financial education content to students seamlessly. Completing the questionnaire ensures we tailor the platform to your needs and provide the appropriate setup and reporting.

Once your form is submitted, the CashCourse team will:

- Set up your institution's access and configurations.
- Email your custom implementation materials.
- Follow up with any questions to finalize your setup.

How CashCourse Access Codes Work

Access codes are the mechanism that institutions use to onboard students into the CashCourse system. Each access code is tied to a **group**, and schools can define whether additional fields — like **student email domain or student ID** — are required at the time of registration.

What Schools Need to Decide for Each Access Group

When creating an access code, each school must define the following:

1. Group Name and Tag

Each access code must be associated with a **Group Tag** and a **Group Name**, which serve distinct but complementary purposes:

- **Group Tag**: This is a short, custom label used to organize and filter student data in your school-facing CashCourse reports. Tags help track engagement by specific cohorts or programs — for example:
    - "pilot" for testing groups
    - "FYS" for First-Year Seminar
    - Course codes, instructor names, or semester tags like "Fall25"

  Group Tags are fully customizable and schools can use multiple tags for different cohorts or audiences. Students do NOT see group tag.

- **Group Name**: This is a more descriptive label that appears as a subtitle on the CashCourse Quick Start Guide you provide to students. It helps both students and staff easily recognize the group their access code belongs to — such as "Fall 2025 Orientation Cohort" or "Professor Lee's Personal Finance Course".

Group Names are not used in reporting but are helpful for providing clarity during student onboarding and in your own documentation. You can use the Group Name to reflect the class, program, or population being served by that particular code.

2. School Email Domain (Optional)
Schools can require students to register with an email address from a **specific domain** (e.g. @university.edu). This helps match records to institutional systems and improve data quality.

However, if students may have multiple or transitional domains (e.g. due to rebranding), this can cause access issues. Multiple access codes can be created for different domains if needed, even if they use the same group tag.

3. Student ID (Optional)
Schools can choose to collect student ID numbers to help uniquely identify users — especially helpful when there are multiple students with similar names.

The **title and help text** for the student ID field can be customized. For example:

- “Cardinal Code” instead of “Student ID”
- Help text can include formatting tips or institutional branding

If you choose to require student ID, but do not customize the title and help text, this is the system default:

Default Title: What is your Student ID?
Default Help Text: Please enter your Student ID number below.

4. Report Setup
Schools decide which staff should receive reports, and on what schedule (e.g. Mondays and Wednesdays). Reports include engagement data filtered by group tag, allowing instructors or coordinators to view only their assigned students.