GETTING STARTED

How to set up & run The Avery Center's Survivor's Guide To Money financial literacy online course in a group setting.

Survivor's Guide To Money can be taken as a solo online course or workbook, or in group settings with a group leader and any number of group participants. This guide is meant to help online course group leaders facilitate the SGTM online course in a group setting.

To see other formats, visit theaverycenter.org/services/survivors-guide-to-money-program

1. SIGN UP & CREATE YOUR GROUP

To get started, purchase the Survivor's Guide To Money Online Group License, available here. Select the number of seats needed for your group—and remember to include yourself!

You can always add more members from within your group management portal if you need more seats.

Complete the checkout process, entering your billing and payment information along with any coupon codes. During checkout, you will also create:

- **Your username and password**
  - o You will use this to login to your group leader dashboard, so make sure you save these login credentials!

- **Your group's name**
  - o Give your group a name that will make sense to group participants (such as the name of your peer support group or parent organization).
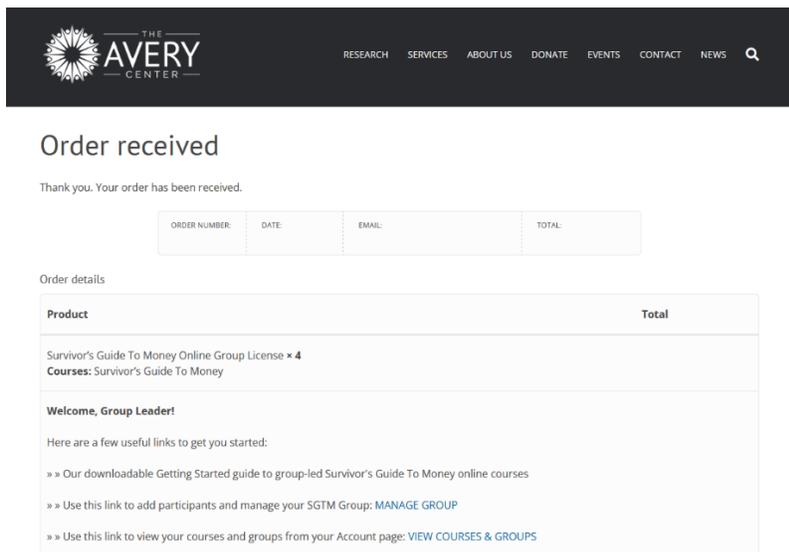
Account username *

| Username | Group settings |

Create account password *

| Password | Group Name * |

2. LOGGING IN AND EXPLORING YOUR ACCOUNT

After completing checkout, you'll land on the Order Received page. From here, you can navigate to several places:

- [My Account](#)

- [View Courses & Groups](#)

- [Group Management](#)

MY ACCOUNT

From here, you can view your account details—such as past purchases, saved addresses, and payment methods. You can also make updates to your account and view your courses & groups.

VIEW COURSES & GROUPS

This page shows you four different sections:

1. Courses I'm Enrolled In
   You'll see Survivor's Guide To Money here, since you are automatically enrolled in any course for which you are the group leader. You can click on the course name to begin the coursework for SGTM and take the course along with your participants!

2. Group Management Link
   This link will take you to the Group Management section, where you can add course participants and follow along with their progress. We'll go into this section in greater detail next.

3. Courses for which you are the Group Leader
   You'll see a list of courses for which you are the Group Leader here.

4. Any Groups that you're assigned to
   You'll see a list of any course Groups you are assigned to here (you're automatically added to any groups that you're leading, of course!). Your participants will see this section in their account after you add them to the Group.

GROUP MANAGEMENT

You'll use this link to use to add participants and manage your Survivor's Guide To Money Group. This is where you can add course participants and follow along with their progress.

In the following section, we'll go through:

- Adding participants to your Group

- Purchasing additional Group seats

- Participant login & course access

- Monitoring Group progress

3. MANAGING YOUR SGTM GROUP

Adding participants to your Group

Select the 'Users' dropdown menu from the [Group Management page](#) to add participants to your Group. You may add them one at a time, in a batch, or upload a spreadsheet of participants. For each participant, you will need a first and last name, along with an email address.

The 'Users' dropdown menu also has an option for exporting and downloading a spreadsheet of current Group participants.

After adding a participant to your Group, they will receive an email with their login credentials (username, password, and a link to login to their account). After login, they can access the Survivor's Guide To Money course. More details on this process in the **Participant login & course access** section below.
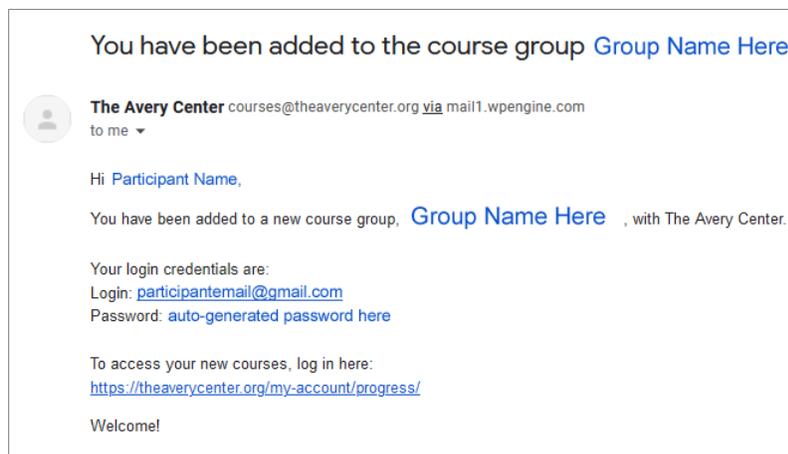
Purchasing additional Group seats

Need to add additional participants to your Group? No problem! Just use the Add Seats button on the Group Management page. You'll be taken back to the cart and can add additional participants to your Group.

Participant login & course access

After you've added a participant to your Group, they will receive the following email:

Subject: You have been added to the course group [GroupName]
Sends from: The Avery Center <courses@theaverycenter.org> via mail1.wpengine.com

While it's typical for this email to end up in the participant's inbox, this info can be useful for searching for the email if it happens to land in Promotions or spam.

The participant simply clicks the https://theaverycenter.org/my-account/progress/ link to get started and will be prompted to enter their username and password from that page. Once logged in, they can begin coursework.

Monitoring Group progress

To monitor progress of the participants in your group, visit the [Group Management](#) dashboard within your account. Select the 'Reports' drop-down in the Enrolled Users section. From here, you can select from:

- Course
- Homework
- Progress
- Essays

Course – This report allows you to see all your course participants and their course completion percentage at a glance.

Homework – Within this report, you can select specific homework assignments to see completion status and date, score (for relevant assignments—many SGTM assignments are not scored or "graded"), and detailed reports.

Progress – The Group Progress Report allows you to select an individual participant to review their overall course completion percentage, as well as progress on specific chapters, lessons, and assignments.

Essays – Select specific Lessons or Topics with essay-response questions to review the submissions for each.

4. PACING AND GROUP MEETINGS

As far as pacing, meetings, and group discussion, options are unlimited. You can set up whatever structure works best for your group. Here are a few suggestions:

- SGTM is intended to be roughly a 12-week course. Going faster can create a considerable time commitment and usually isn't feasible for groups, but a pace of 1 chapter per week for 12 weeks, or every-other week for 24 weeks, usually works well.

- It can be useful to have regular group meetings or check-ins, either in person or virtually via Zoom. Once at the end of the week, when everyone has had a chance to complete that week's lessons and homework, works well for most groups.

- Setting up a group text, email thread, or chat for members of your group can give a place for members to feel more connected between check-ins. It also provides an opportunity to share experiences and ask questions.

Should you encounter any questions as your group works through the course, please send an email to course@theaverycenter.org.