SUNY **Smart Track** SM
Empowered Financial Planning

SMART TRACK ADMIN GUIDE

SUNY has partnered with Inceptia, a private, nonprofit organization, to provide online financial education to your students and teach them personal finance basics in an engaging environment. Inceptia's online financial education program, Smart Track, offers online courses with proven learning objectives, videos, tools, and resources to help students gain important knowledge about the basics of personal money management – information that will help start them on the road to wise financial management. Smart Track allows users to complete courses individually in a self-paced environment that is available 24/7, focusing on knowledge gain and behavior modification.

ACCESSING YOUR FINANCIAL AVENUE ACCOUNT

1. Go to **www.financialavenue.org/?theme=suny** and click **Login**.

2. Then, click on **Administrator** in the Log In box (shown on the right).

3. Enter your Email Address and Password, and select **Log In**.

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WHAT YOU'LL SEE

After logging in, the Getting Started page will provide you with tools to learn more about the program, including:

- This guide
- Student registration resources, including a guide and PowerPoint tutorial
- Video tutorials on navigating and using the administrator toolkit

To navigate to other sections of the administrator portal, use the drop-down menu under the **"Dashboard"** tab.
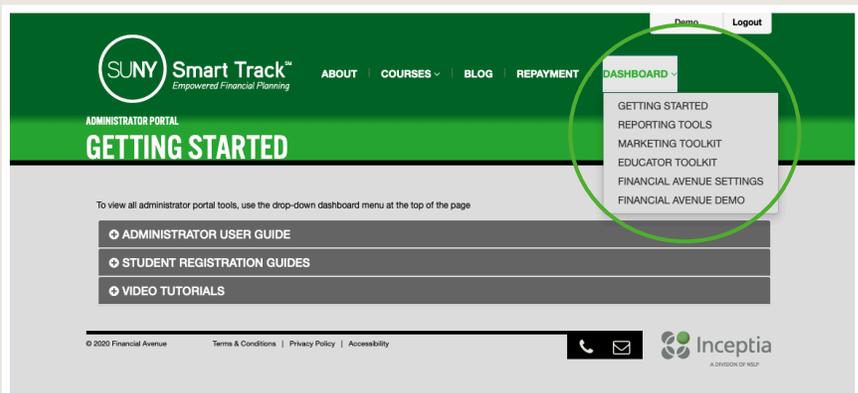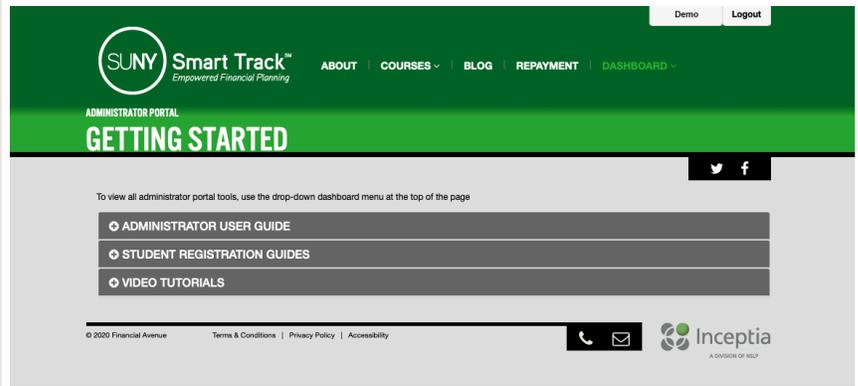
REVIEW STUDENT PERFORMANCE

After selecting **"Reporting Tools"** from the Dashboard menu, the first screen to appear reflects a snapshot of overall program success. You may expand these sections for quick, high-level data regarding user activity within Smart Track: how many students have registered, how many have completed all program requirements (set by the school), and the average pre and post-test scores for each course. Viewing student activity can help track peak engagement periods within the year and can also help prepare for future academic year planning.
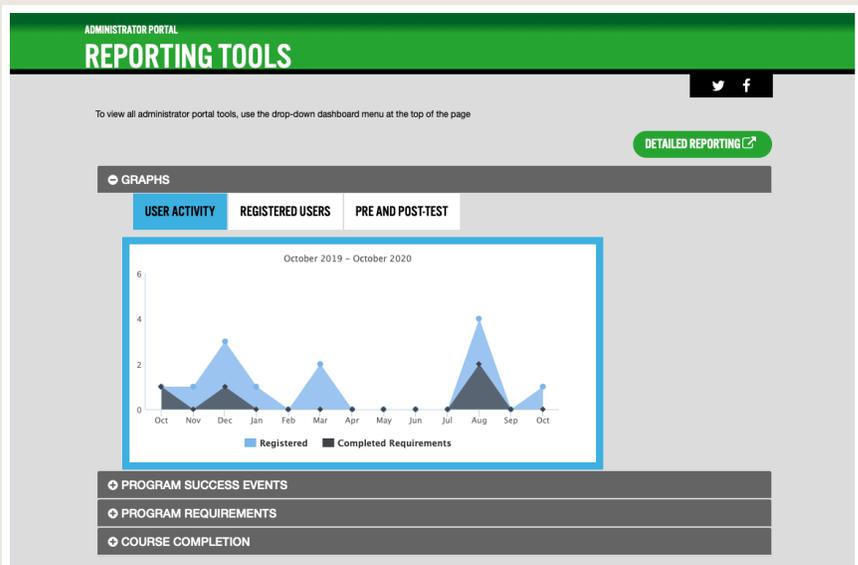
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In order to view specific student performance information, click on **Detailed Reporting** in the upper right hand corner.

Users may need to enable pop-up blockers for the screen to appear.
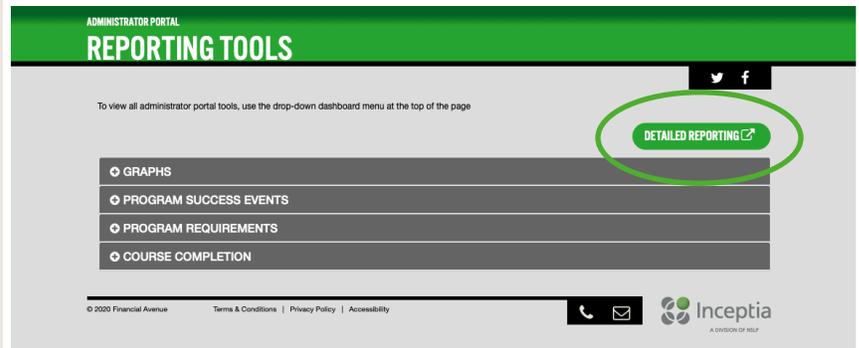
Once there, you will be able to select from a variety of reporting options.
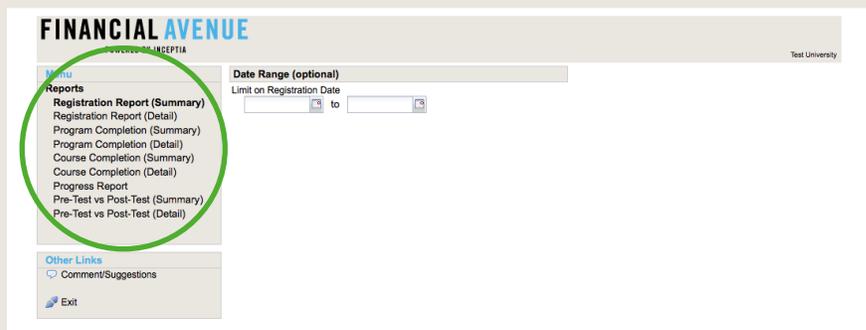
REPORT OPTIONS

This reference list will help you determine which report best suits your needs:

- **Registration Report**: A count of all users who have created an account (registered users total).
- **Program Completion**: A count of all users who have met the program requirements.
- **Course Completion**: A count of users that have completed the selected course(s) with the minimum grade required, and the average grade of users for each course.
- **Progress Report**: A listing of each user that has not yet completed the program requirements: including name, email, ID, and scores with test dates for each required class. Downloadable in Excel. *This report can be used in tandem with the Program Completion Report. This report will show administrators who hasn't completed all of the set requirements yet. Once a user completes all requirements, they move to the Program Completion Report.
- **Pre-Test vs. Post-Test**: A count of users that have completed the selected course(s), including pre-test and post-test average scores as well as percent difference for each course.

All detailed reports can be run based on date ranges to include less or more results. All detailed reports can also be downloaded into Excel and include the following additional user characteristics: age range, phone (type of number), gender, last access date, major, year in school, student ID, and professor.

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PROMOTING SMART TRACK

To help promote Smart Track, Inceptia offers a variety of customizable marketing pieces available within your administrator portal. After logging in, select **Marketing Toolkit** to access collateral available to administrators to use with students. *User may need to enable pop-up blockers for the screen to appear.*

- **Article Templates:** Use these article templates in email communications or newsletters that you send to your students, parents, or employees. Each article highlights the benefits of each course and encourages participation in that course.

- **Course Flyers:** Use these flyers to post or distribute, encouraging participants to complete a course. Each flyer contains an area where you can insert your School Name and Access Code.

- **Program Brochure:** Use the Program Brochure to provide participants with an overview of Smart Track and each course. The brochure contains an area for you to insert your School Name and Access Code.

- **Email Assets:** Use these various graphics to enhance your email communications to your Smart Track program participants. Remember, you can use the content from the article templates mentioned above to spread your message. Be sure to include your organization name, physical address, and unsubscribe information in order to be compliant with CAN-SPAM regulations.

- **Social Media Guide:** This social media guide includes sample content for social media platforms to promote Smart Track and financial education to your students.
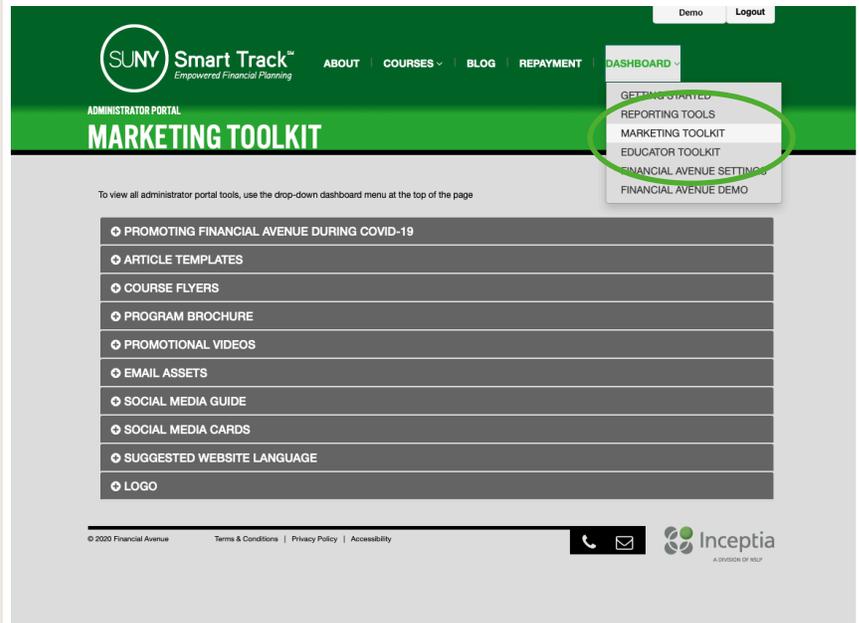
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INTEGRATING SMART TRACK

At your disposal is an Educator Toolkit which contains activities, lesson plans, videos, and other materials to help you easily integrate the program into your classroom or lecture. PowerPoints and Prezis are available to supplement each course, as well as a best practices hub.
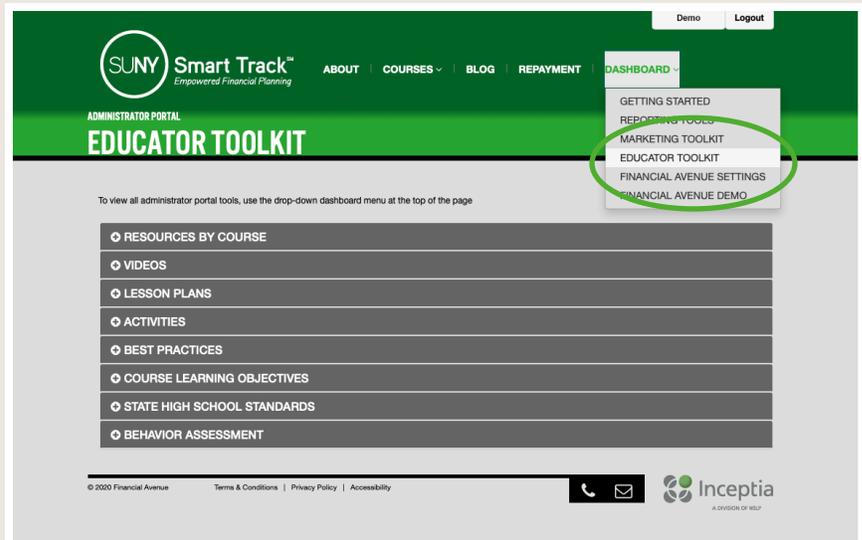
PREVIEWING SMART TRACK COURSES

As part of your administrator portal, you will also have access to a Smart Track demo account. Clicking this link will allow you to participate in the Smart Track courses as a student would to get the full user experience.
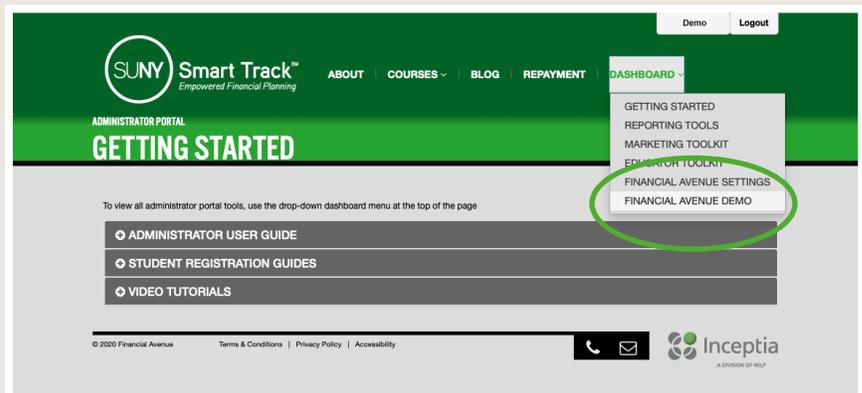
www.suny.edu/smarttrack | 🐦 **@MoneyKnowl**

QUESTIONS/SUPPORT

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