Edvance360 Guide For Coaches

This guide is for coaches who have successfully completed coach training. It focuses on reviewing your client's work and providing feedback.

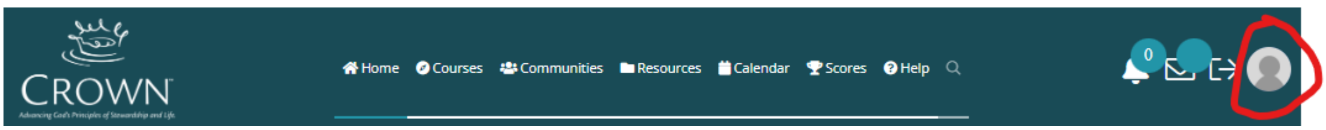
Log in at crown.edvance360.com with your email and the password you used during your training.

If you have any problems, please contact your Trainer.

COMPLETING YOUR PROFILE

If you did not finish completing your profile during training, please do so as soon as possible, following the instructions below.

- Click the circle icon at the top right of your screen and select ***Profile*.**

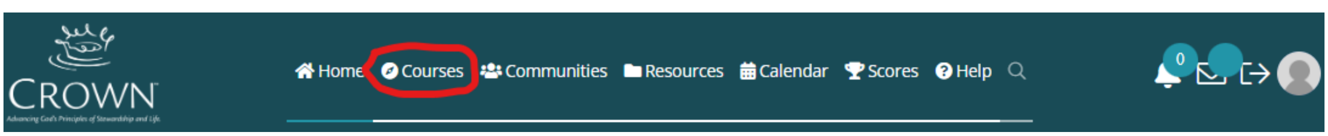


- To edit a section, just click the "***Edit***" icon on the right side of the blue bars.

- Click "***Save***" to keep your changes.
- Upload a current Profile Photo of yourself. (Really, we want to see you!)
- Fill out your profile information including a bio about yourself that provides a well-rounded idea of who you are and why you are motivated to be a Budget Coach.

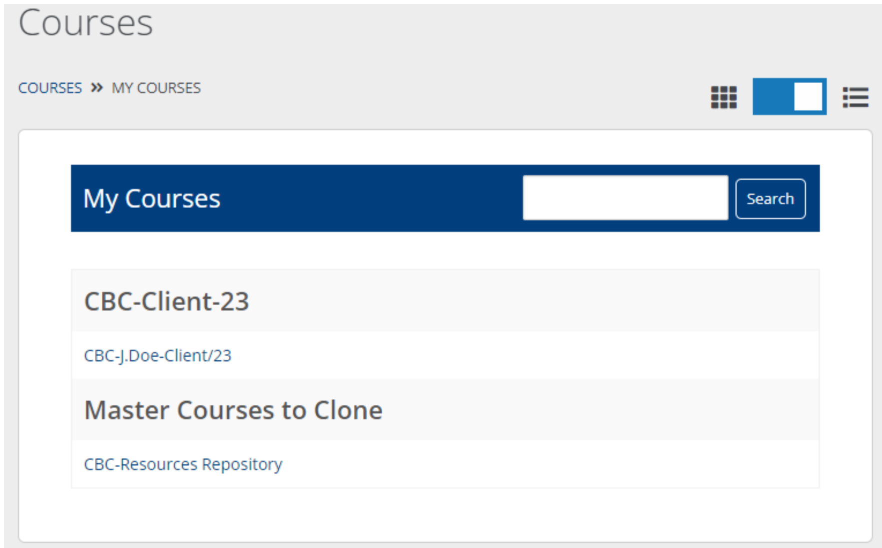
ACCESSING YOUR COURSES

Choose "**Courses"** at the top.

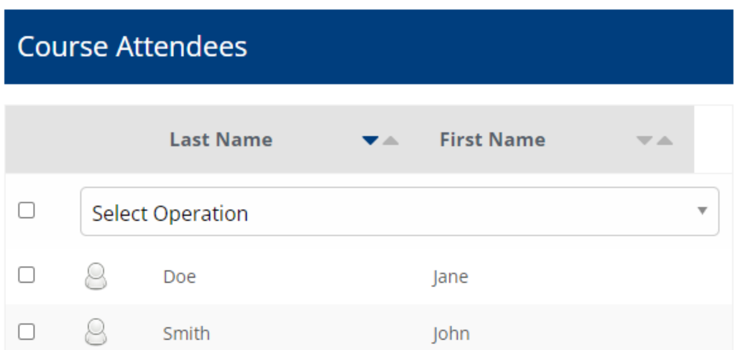


After your first client's account has been created, you should see two or three courses in your list:

- Resources Repository
- Client Course
- Coach Training Course (if this hasn't been removed yet)



Click on the name of your client course to review your client's work. You will be directed to the ***My Course*** home page. Here you will see a list of your course attendees, which will include yourself and any clients who have been assigned to you.

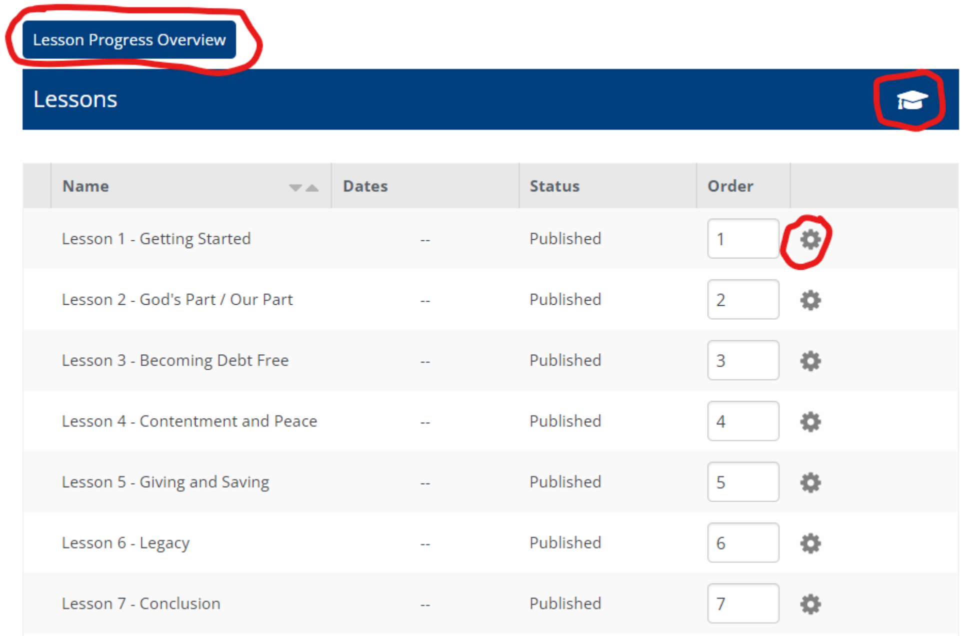


NOTE: Client accounts are only created after you complete the BC Management Smartsheet, indicating that the Getting Started meeting has been scheduled.

The left-hand side bar items give you access to several functions. Your reviews will focus on ***Lessons, My Doc Vault*** and ***Assignments***.

REVIEWIING LESSONS

Click “Lessons” on the left-hand side menu.



- The “Lesson Progress Overview” button will enable you to see your client(s) progress on each lesson.
- The cog wheel will allow you to view and scroll through all the screens in that lesson.
- The mortarboard icon will let you see this screen the way your client will see it.

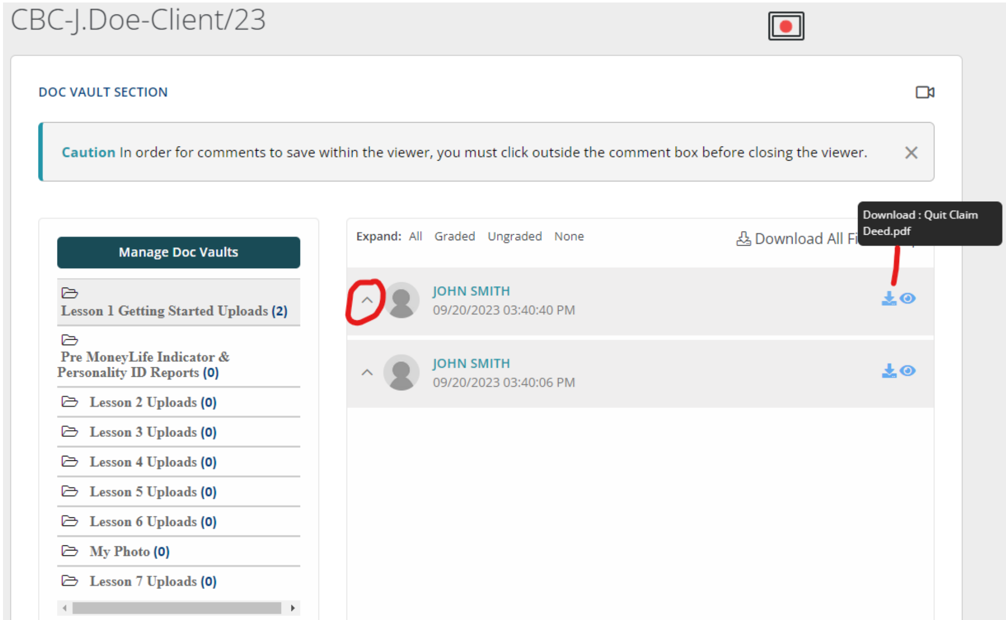
During the introductory meeting with your client, you can click on the lesson title to show them how to click ***Mark Complete*** and ***Next*** to move through the lesson sections. After showing this, switch to the cog wheel view to more quickly provide an overview of the lesson.

At the end of each meeting, you should review the next lesson’s content with your client using the cog wheel function.

NOTE: In the Assignments, which start in Lesson 2, let them know that their answers are not automatically saved, and they should click the ***Save Progress*** *button at the bottom periodically to prevent losing work.*

REVIEWING MY DOC VAULT SUBMISSIONS

Click “My Doc Vault” on the left-hand side menu.

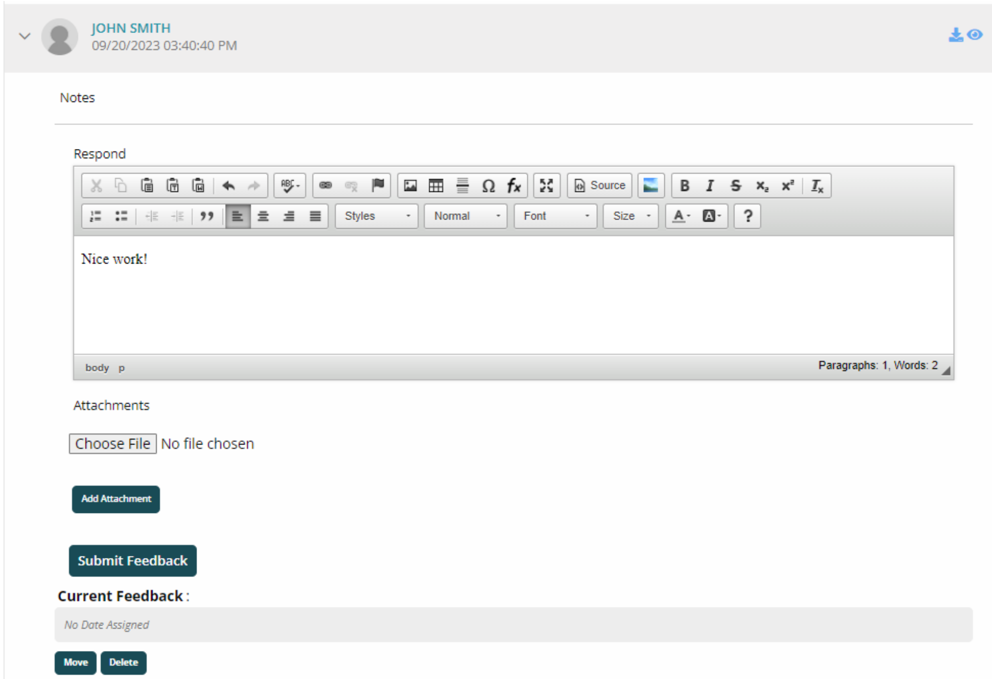


Choose a folder on the left.

After choosing the folder, you will see the items that have been uploaded to that folder. If you mouse over the download icon, you will be able to see the filename. Click to download. You can also view by clicking the eye icon.

NOTE: “Ungraded” and “Graded” have no meaning since client work is never assigned a grade.

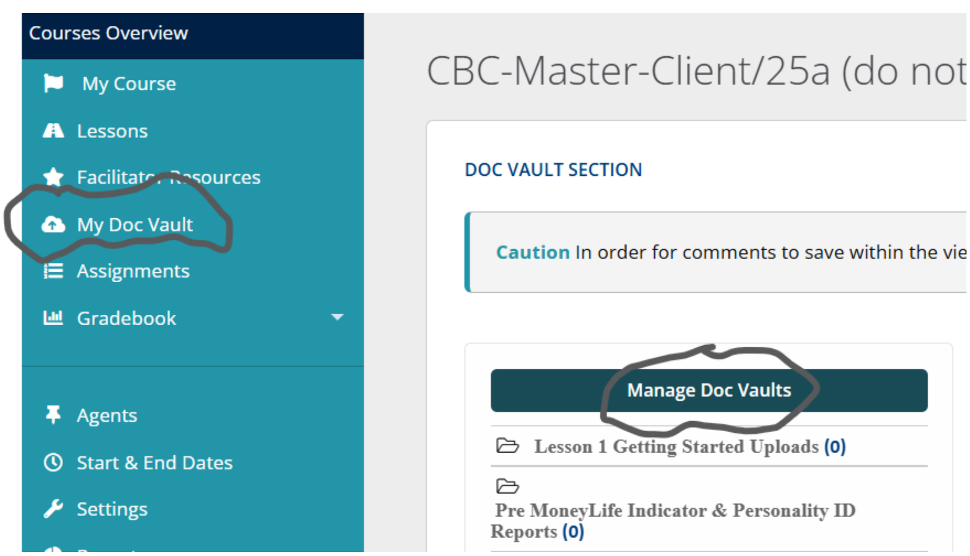
Clicking the ^ icon will allow you to provide feedback, which can be entered in the “Respond” area. You can add attachments if you wish. When done, click the “Submit Feedback” button.



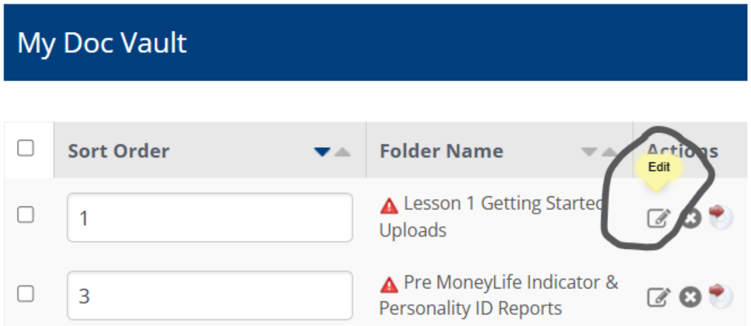
Remember, there is a ***My Doc Vault*** link available at the end of each lesson for documents that the client may wish to upload that are not part of the actual course assignments. (The ***My Doc Vault*** folders are called "Lesson _ Uploads.") For example, if you have asked them to get different insurance quotes, they could upload them for your review in the ***My Doc Vault*** link provided at the end of the upcoming lesson that you will be reviewing at your next meeting.

Doc Vault Notifications: If you would like to receive an email when a document is uploaded to My Doc Vault, do the following:

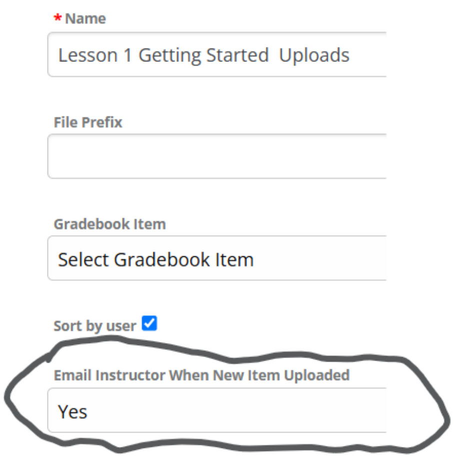
Go to "My Doc Vault", then "Manage Doc Vaults":



Click the Edit button next to each folder you want to start receiving notifications for:



Then select “Yes” under “Email Instructor When New Item Uploaded.”

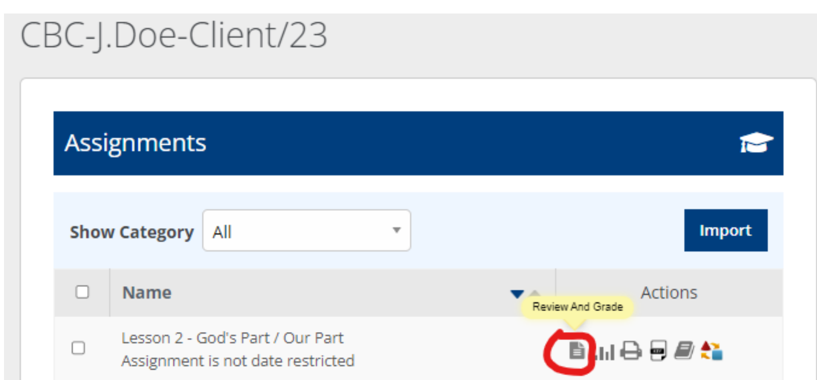


Click “Submit.”

REVIEWING ASSIGNMENTS

Click “Assignments” in the left-hand side menu.

Click the “page” icon (circled in screenshot below) to review and comment on assignments. (Pop up message says *Review and Grade.)*



In the **Review & Grade** screen, you will see a list of clients who have started or completed their work. You will not be able to provide feedback until the assignment has a date in the “Completed” field. Clients must answer all questions and click “Finish Assignment” to be completed.

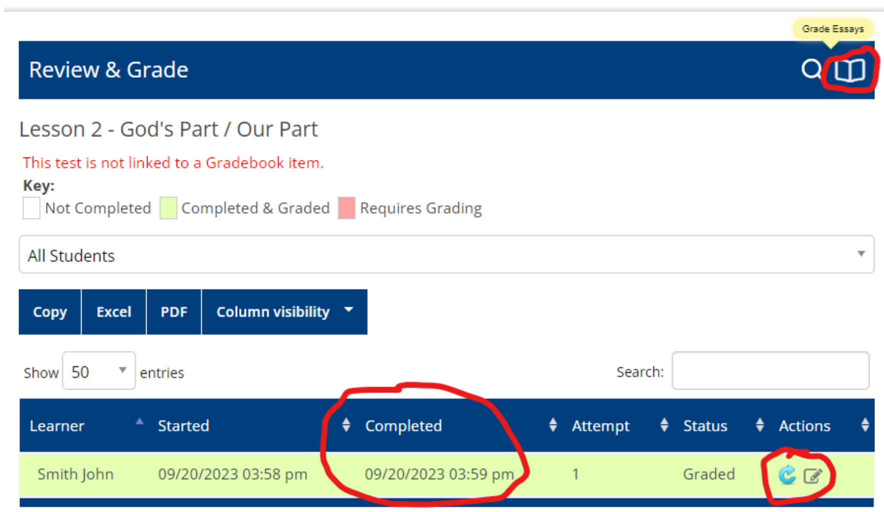
NOTE: Ignore the status “Graded”. Client work is not graded and it does not indicate feedback has been provided.

Under “Actions”, clicking the “Retake” button wipes out all the client’s answers and allows them to completely start over. In most cases, you should not use the “Retake” button. Clicking the “Edit” button will allow them to re-open the assignment to edit their answers. You may choose to do this if the client’s answers are signficantly incomplete.

NOTE: Choosing either “Action” button will wipe out any feedback you have entered in that assignment as soon as the client re-completes the assignment.

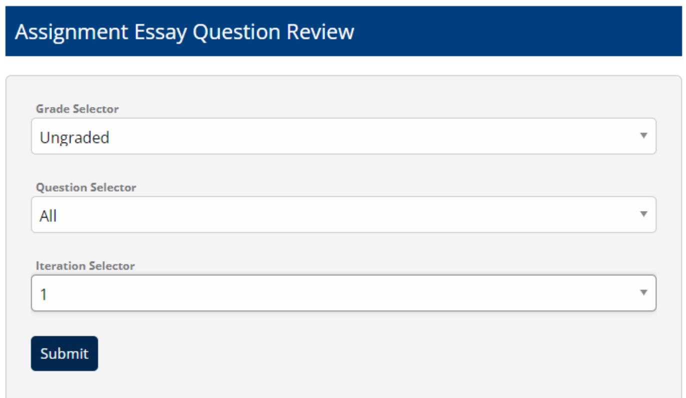
You may view your client’s work, whether complete or incomplete, by clicking on their name.

To provide feedback, click the “page” icon circled in the screenshot below. (Pop up message says *Grade Essays.*)



In the **Assignment Essay Question Review** screen, you will see three selection boxes. After these have been selected, clicking the "Submit" button will bring up the client's questions and space for your feedback. The questions will be filtered based on your selections.

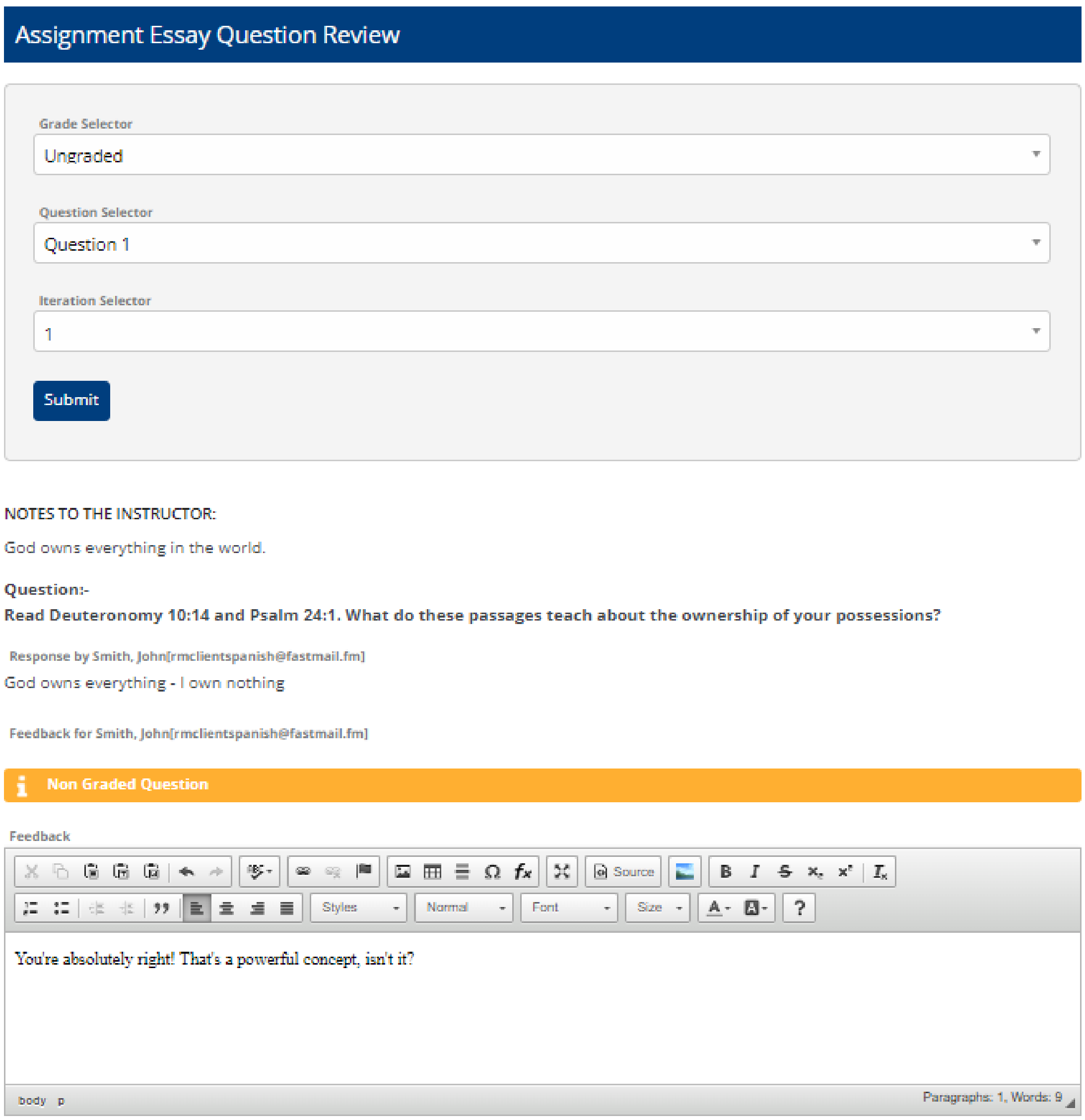
- The "Grade Selector" defaults to *Ungraded.* On this screen, *Ungraded* means that no feedback has been entered. To change or view a comment you already entered, choose *Graded.*
- The "Question Selector" defaults to *All.* If you want to review only one question at a time, you can choose a specific question number here.
    - NOTE: If you select "All" the "Notes to the Instructor" (which are the suggested answers) may not display correctly. To see the correct "Notes to the Instructor", choose only a single question in the Question Selector.
- The "Iteration Selector" does not need to be changed.



After hitting "Submit", the first thing you may see are *Notes to the Instructor* which is a suggested response. Below *Notes to the Instructor* is the question, followed by the client's response. Below the client's response is a box for your feedback.

You are encouraged to add feedback. It may be as simple as "You got it" or "Exactly right." It could be additional scripture references, words of encouragement, a quote, a response to gently correct faulty thinking, or a personal story. **After you submit your feedback, your client will be able to see the *Notes to the Instructor,* so you do not need to duplicate those suggested responses in your feedback.**

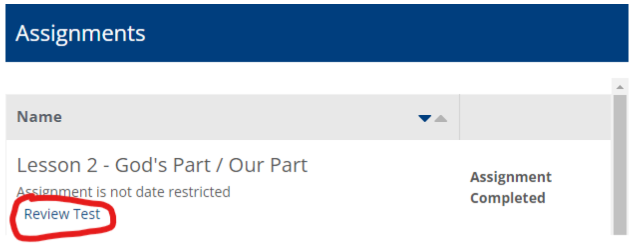
During your next meeting, pick a few questions to discuss. This may be to drive home a principle, answer a question or point of confusion the client expressed, or provide encouragement. Afterwards (or even while you are meeting), you can add anything else that may be helpful for them to review based on your discussion by going back to the assignment and choosing *Graded*.



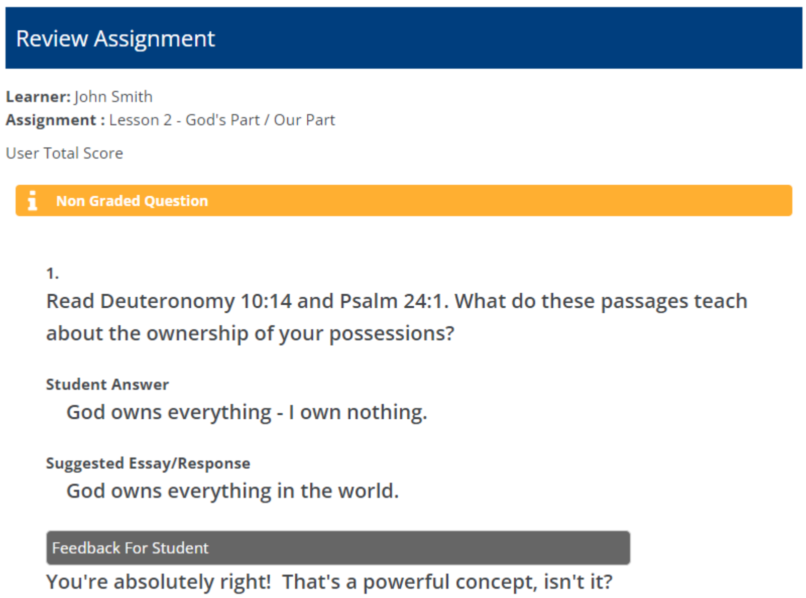
Your feedback is not automatically saved, so when you have finished feedback for each question, scroll down and click **Submit Score and Feedback.** Keep in mind, you are just submitting feedback, as you are not scoring or grading.

HELPING YOUR CLIENT REVIEW ASSIGNMENT FEEDBACK

After you have provided feedback, notify your client so they can go in and review before you meet. Be sure to show them how to access and view the feedback you have given to them. They do this by choosing *Assignments* on the left-hand menu, then *Review Test.* Below is what your client will see:

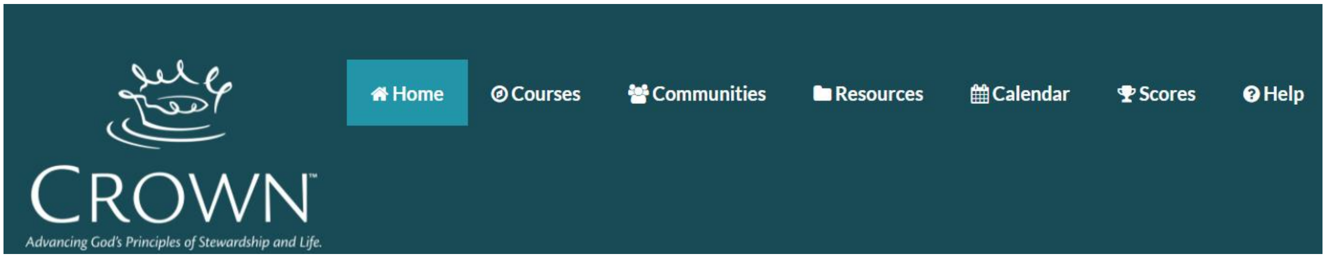


In the **Review Assignment** screen, the client will see the question, their answer ("Student Answer"), the "Suggested Essay/Response" (same as "Notes to the Instructor", if one is available) and your feedback ("Feedback For Student").

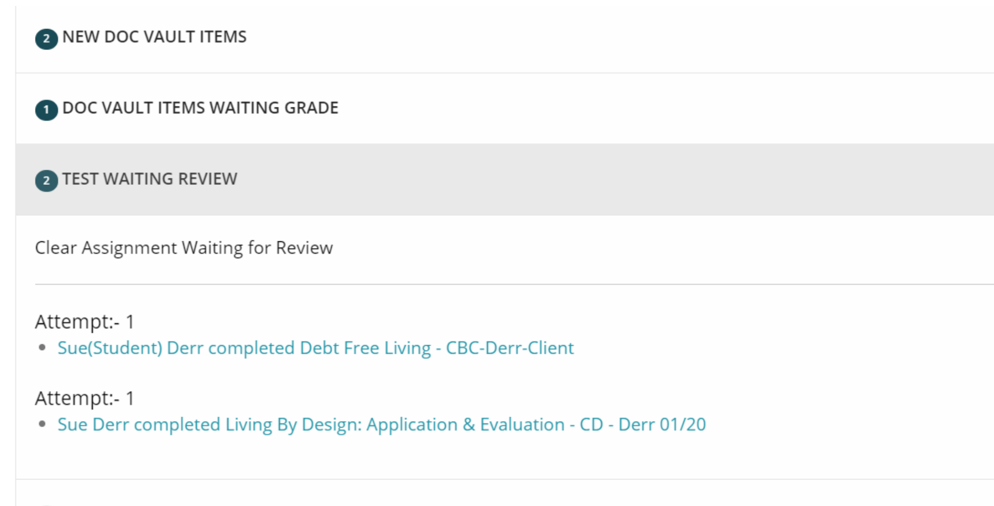


If the client wants to retain this, encourage them to either copy and paste to another document, or print this screen to PDF, since their course will be removed a few weeks after completion.

COURSE ALERTS

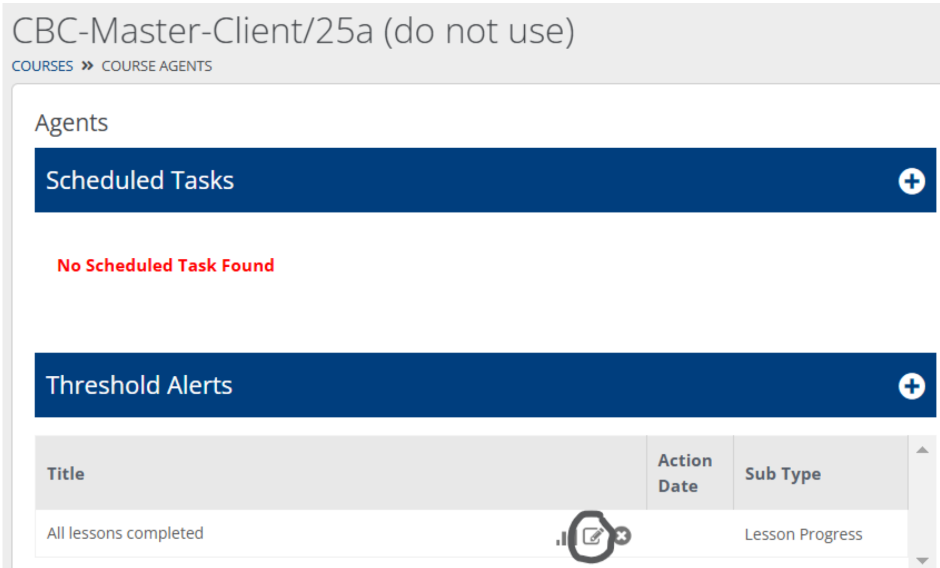


From the ***HOME*** screen you can view "Course Alerts" (scroll down just a little). This is an easy way to see and access items that may be ready for review.

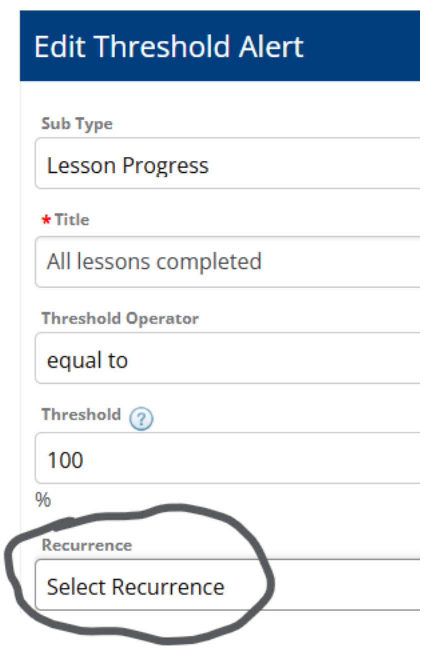


SETTING AN ALERT FOR CLIENT COURSE COMPLETION

If you want to get notified when your client completes 100% of the lesson material, go to "Agents" on the left side of your screen. Under "Threshold Alerts", you'll see an entry called "All lessons completed". Click the edit button on that line:



By default, you will not receive notifications. To get notifications, you have to make a selection under "Recurrence", and you should choose "Daily."



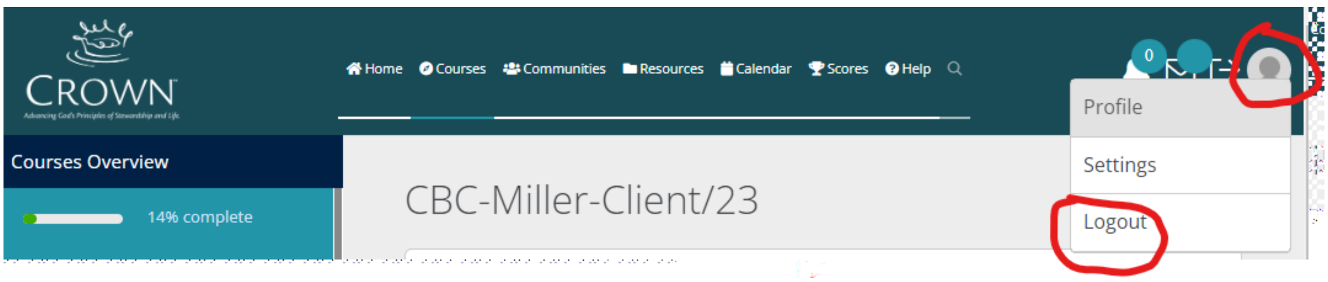
At the bottom, you'll also need to set a start and end date for the notifications.

Click the "Save" button.

NOTE: You'll continue to get email notifications daily until you turn this off. There is no way to get a one-time only notification. The best way to turn it off is to just choose "select recurrence" under Recurrence, or you can change the end date.

LOGGING OUT

To log out without closing your browser, click the circle icon at the top-right of your screen and click ***Logout***.



HELP

From the top menu, click ***Help.*** Here you will find links to this guide for both clients and coaches, a Crown tutorial video for clients and numerous PDF and video tutorials provided by E360 on the various website functions.

If you don't find your answer there, please contact your Trainer. Your Trainer can escalate the issue if needed.

FINAL AND IMPORTANT NOTES

Your client course will remain active while you are an active coach and continue to have clients. After clients finish, they will have access to your course for about a month in order to download or print materials; after that their account will be deleted from the system.

In some cases, you may see more than one client course. This may happen if an updated master client course gets created while you still have clients who have not finished the previous version of the course.

You will continue to have access to the Resource Repository while you are an active coach regularly taking new clients.

Links to course videos are available upon request for clients after completing the course. **No one should share these links** with others without specific permission from Crown Financial Ministries, and should **never charge** for video viewing. A document with these links is available in the Resources Repository.

As a volunteer Crown Budget Coach, you join an outstanding group of people, all of whom are seeking to be good stewards of God's resources. We thank you for your service, and pray that this is a blessing in your own spiritual journey as well as in the lives of your clients.