AttendingFi

IMPLEMENTATION GUIDE

Launching the Financial Readiness Program

A step-by-step guide for your office — from first review to live, in about a week

For Financial Aid Offices, GME Offices, and Program Coordinators

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> This guide is for the staff member who will actually set the program up. It assumes no technical work and no budget. The whole process is a short review, a quick co-branding confirmation, and dropping a link into touchpoints you already run.

What you'll need (all you'll need)

- Your program's **name** as it should appear on the co-branded page.
- A **logo file or URL** (optional but recommended).
- An optional **brand color** (hex code).
- The **three places** you'll put the link: orientation materials, a Match-Day touchpoint, and your exit-counseling session.

That's it. There is nothing to install, no account to provision, no student data to upload, and no integration with your systems.

Step 1 — Review (Week 1)

Read the **Institutional Brief** and forward the **Security & Privacy Brief** to whichever office (procurement, compliance, or IT) would normally review an external resource. Because the tool requires no student PII, no login, and no system access, the review surface is a co-branded link — not a data integration — so this step is usually fast.

Step 2 — Confirm co-branding (Week 1)

Reply to AttendingFi with your program name, logo, optional brand color, and where you'd like the link to live. A 20-minute call is enough to finalize everything.

Step 3 — We publish your page (within ~1 week)

AttendingFi builds and hosts your co-branded student page (your name and logo alongside the tool) and sends you the live link to review before you share it. We keep the tool current with federal program rules; there is nothing for your office to maintain.

Step 4 — Place the link (Week 2)

Add the co-branded link to the three moments below. Ready-to-paste copy (email, newsletter, portal blurb, orientation talking points) is provided in your toolkit so you don't have to write anything.

Moment	What to do	Obligation it supports
Orientation	Link the "how your loans work" module in the orientation packet or include a 10-minute walkthrough.	Debt-management counseling
Match Day		Wellbeing / financial stress

	Share the refinance-decision checklist so students see the irreversible mistake before they can make it.	
Graduation	Offer AttendingFi as the physician-specific companion to your required exit-counseling session.	Federal exit counseling

Step 5 — Cohort reporting (automatic, optional)

If you elected the cohort view, it activates automatically once your co-branded page is in use. You'll be able to see aggregate, de-identified figures — engagement and debt distribution for your class — useful for demonstrating your debt-counseling efforts. No individual student is ever identified, and nothing is required from your office to enable it.

Ongoing — what recurs, and what doesn't

Recurs automatically: because the link lives inside events you already run every year (orientation, Match, exit counseling), the program renews itself with no new setup. **Does not recur:** there is no renewal to sign, no license to true up, and no maintenance for your office — AttendingFi keeps the tool current.

Quick-start checklist

- ☐ Read the Institutional Brief; forward the Security & Privacy Brief for any required review.
- ☐ Send AttendingFi your name, logo, color, and link placements (or book a 20-minute call).
- ☐ Review your co-branded page when it arrives.
- ☐ Paste the provided copy into orientation, Match, and exit-counseling touchpoints.
- ☐ (Optional) Turn on the anonymized cohort view.

AttendingFi is an educational resource and does not provide individualized financial, legal, or tax advice. There is no cost to your institution or its students.