Platform Migration Checklist

Fundamental Information:

- Your name
- Your email address and phone number

Additional Implementer:

- Name
- Email

Integrations:

Some of our partner organizations utilize integrations to automate the learner or administrative process. We currently have two integration options:

- Single Sign On
- API- Data exchange

**Single Sign-On** registration (or SSO) requires learners to authenticate through their school or organization system in order to access the EVERFI platform and courses. Without SSO, a learner will authenticate through EVERFI’s login.

The **EVERFI REST API** allows our customers to integrate their campus or organization system with the EVERFI platform in order to automatically create, update and maintain learner profiles, and retrieve course progress data within the EVERFI system. Without this feature, learner information must be manually added and updated by the administrator and course data must be manually downloaded in the EVERFI system.

- Are you planning to use a technical integration in your implementation (e.g. Single Sign On or API)?
  - IT contact Name
  - IT contact Email
Data Migration:

If you are currently using the EVERFI platform, you have the option to migrate the historic progress data. This means that we will import the learners and their progress points from the EVERFI platform to Foundry. We can only migrate this data one time.

While we offer this as an option, it is highly recommended that you start with a clean slate and NOT import the data. Because many organizations have duplicate enrollments, this can complicate the assignment process once in Foundry.

The recommendation is that you download your data so that you have a record of completion and start in Foundry for the upcoming year.

Please note, this option is not available for Campus Clarity or Workplace Answers.

- Would you like us to migrate your data?

If you elect to migrate your progress data, EVERFI can only migrate the data once upon creation of your account. In order to ensure that we capture all of your learner progress before the migration you will need to stop assigning the courses and confirm that learners have stopped making progress.

Below you will be asked to provide the last date the learners will make progress in your courses. We will not create your Foundry account until after this date.

- Last possible date learners will be able to make progress in their EVERFI courses.

Please note that not all courses may be available to your institution based on your EVERFI agreement. Please contact your Customer Success Manager if you are unsure.

- Courses you are interested in launching
  - we will provide a list- you can view the catalog here
- Course start date