Continuing Education + Code of Ethics and Fair Housing

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Agenda

- Continuing Education Overview
- Before you start…
- Let's go!
  - Create Certification
  - Set Certification as Default
  - Create Component(s)
  - Add Components to Events
  - Complete a Component
- Special Case: Events with both COEC and COEN credits
- Tracking Progress
- Reporting

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Continuing Education Overview

What is the Continuing Education module?

The Continuing Education module within GrowthZone allows associations to administer, track, and report on the professional certifications of their members. With the proper setup, associations can save themselves and their members time in managing the courses, exams, and other tasks.

Continuing Education Overview

What is the Continuing Education module?

The Continuing Education module is required in order for GrowthZone to <u>automatically</u> update the Code of Ethics and/or Fair Housing section on the Real Estate tab after a registrant is marked as attended.

Continuing Education Overview

Continuing Education- The Simple Setup

This Continuing Education + Code of Ethics/Fair Housing setup is being built under the following assumptions:

No Fees are being charged for components (courses)
No Objectives are required
No Categories are needed
No prerequisites are required
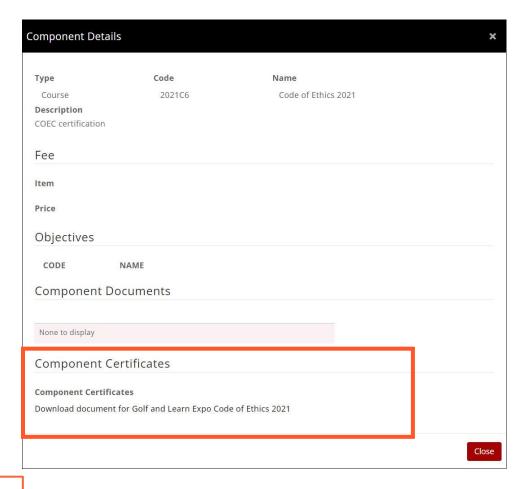*No Terms & Conditions are necessary*
No need to track "completion"- only tracking attendance/hours to update the Code of Ethics data being sent to NRDS/M1

With this simple approach, we are only using a couple key areas of the module.

*At the component level- there may be fees at the event level!

Continuing Education Overview

Most associations provide a **certificate** to event attendees to document credit for **completing a component (course)**. This is done by **linking a certification component to an event**, which is also **tied to the continuing education certification** created to track ongoing continuing education. The **credits** and **certificates** are tracked within the Database and are visible to the member in the Info Hub.

Before you start...

There are a few things you will want to consider before creating your continuing education program:

- Custom Fields

- Document Generation

  - Component Certificate Template
  - Roster

- Automated Messaging

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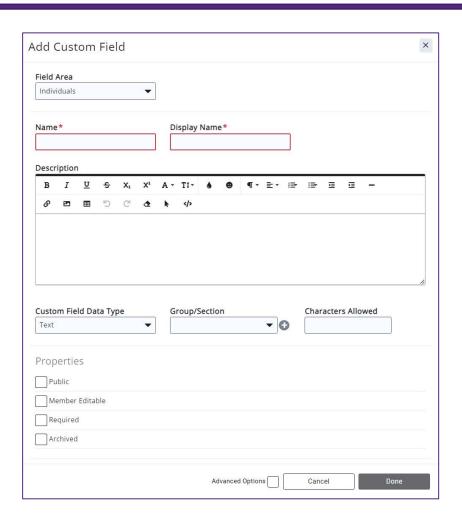smarter association software

Before You Start… Custom Fields

Some associations need to include a unique identifier on certificates. There are 2 options for custom fields:

- **Individual Custom Field:** is included in the contact record and can be visible/updateable in the Info Hub.

- **Event Custom Field:** is related to a specific event (class), and can be reported on, but is not tied to a contact record and cannot be added to a certificate.

GZ Knowledge Base: <u>Custom Fields</u>

Before You Start... Custom Fields

Individual Custom Fields can be enabled for use in event registration in the Event Settings Defaults.

These fields will need to be set up in advance using **Individuals** as the field area.

- Name/Display Name: these should be the same, no symbols
- Properties: **Public** and **Member Editable** should be selected. **Required** is optional.

Before You Start… Document Generation

There are several templates GrowthZone uses within the Continuing Education module. They are included in your subscription and can be used "as is" or they can be copied and customized as needed.

- Certificate Templates (not discussed in today's session)
- Component Certificate Templates

GZ Knowledge Base : <u>Setting up Document Templates</u>

Before You Start... Document Generation

Component Certificate Templates

Most associations provide a certificate to event attendees to document the credit they receive for completing a class. This is done by linking a component to an event and having a component certificate template linked to the component. Component certificates must be set up as a Certificate Component-type document template to be available.

GZ Knowledge Base : <u>Setting up Document Templates</u>

Before You Start… Document Generation

Certificate of Completion

Name: Lynn M Cayford

Real Estate License Number: BA920939

Address:

Course Title: Code of Ethics

Course Certification Number: LL21C009LE

Course Location:

Course Instructor(s):

Provider's Name:

Provider's Certificate Number:

Course Completion Date: 9/12/2018

Number of Clock/CE Hours: 3.00

Signature:

Tammy Lapierre, Kennebec Valley Board of REALTORS

KEEP THIS CERTIFICATE AS VERIFICATION THAT YOU COMPLETED THE PROGRAM NAMED. IF YOU ARE AUDITED UPON THE NEXT LICENSE RENEWAL, YOU WILL BE REQUIRED TO SUBMIT THE REAL ESTATE COMMISSION CERTIFICATES SHOWING YOU COMPLETED A **MINIMUM OF 21 HOURS OF APPROVED CONTINUING EDUCATION THAT INCLUDES THE REQUIRED CORE COURSE DURING YOUR CURRENT LICENSE TERM**.

Access the component certificate template in Setup -> Document Generation Templates -> ContinuingEducationUnit.docx, or create your own (like Kennebec Valley did).

See Continuing Education/Certificates Merge Fields for available merge fields for use in Component Certificate Templates.

Before You Start... Automated Messaging

Automatic messages may be configured to be sent in response to certain actions. For example, an automated message may be sent to a member when they complete a component by attending an event. Your database is pre-configured with automatic messages, which you may use "as-is" or customize to meet your needs.

GZ Knowledge Base: Automated Messaging

Before You Start… Automated Messaging

The following automated message templates should be reviewed, customized if needed, and set for delivery:

- ✓ Registered Event Attendee
- ✓ Unregistered Event Attendee
- ✓ Certification Component Completed

NOTE: These are global messages and are sent for EVERY registration, cancellation, and component completion. If you wish to send out event- or component-specific messaging, <u>custom email templates can be created</u> and sent manually.

GZ Knowledge Base: <u>Automated Messaging</u>

1. Create a Certification

Certification Checklist:

- ✓ Certification Name:
  Continuing Education or Ongoing Continuing Education

- ✓ Description:
  Continuing Education or Ongoing Continuing Education

- ✓ Determine Certification completion via:
  Do Not Track Completion*

  *We are only tracking ongoing continuing education; the certification itself will not be completed.

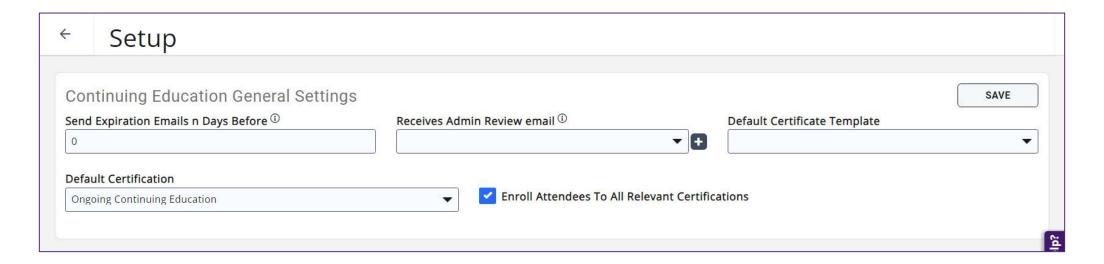GZ Knowledge Base: Add a Certification

1. Create a Certification

Because of the simple set-up, we are not using most of the fields within this area. The key details such as the certificate template, credits, etc., will be set up within the components.

2. Set Certification as Default
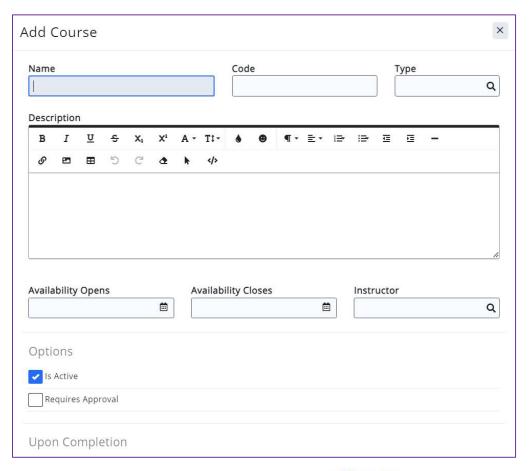
Setup -> Continuing Education -> General Settings

GZ Knowledge Base : Continuing Education General Settings
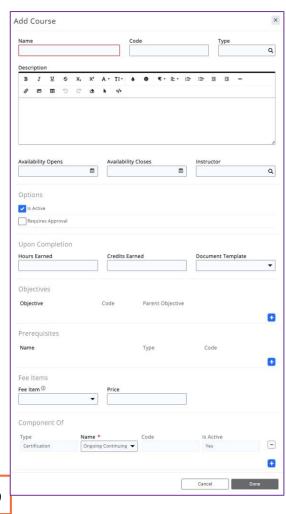
3. Create Components

Components are individual items that count towards the continuing education. For most users, components are typically **courses**, and are not tying in exams, tasks, or objectives. GrowthZone subscribers providing a certificate for each course must link their created certificate component template to the individual components.

GZ Knowledge Base: Add a Component

3. Create Components

Because we are keeping things simple in relation to tracking, many fields are not used but the following are required:

✓**Name** – Enter the course name for component.

✓**Type: COEC, COEN,** or **FAIRH** (you will need to make at least one component for each type) **IMPORTANT!** For the component to automatically update the Code of Ethics or Fair Housing sections on the Real Estate tab and sync to M1, this MUST be completed!

✓**Is Active:** enabled by default (needs to be checked for the component to be available)

✓**Hours Earned / Credits Earned** – Enter the hours or credits received for attendance.

✓**Documentation Template** – Point to the component certificate template created/customized previously.

✓**Component Of** – This must be attached by selecting your Continuing Education Certification. (If default certification is selected in General Settings, this will automatically populate.) **If not attached to the certification, attendees will not be enrolled or receive credit.**

4. Events and Adding Components

Additional Attendee Setup Options:

- Registration Form Settings
- Custom Fields
- Registration Types: Free, Simple Paid, Table/Team, Advanced
- Registration Discounts
- Additional Items
- Instructions and Confirmation Messaging

4. Events and Adding Components

Custom Fields

Individual Custom Fields: If using the individual custom fields you must ensure that 'Is for Attendee' is selected as an additional property and applied to specific registration types under advanced settings.

Event Custom Fields: Any event specific custom fields can be tied to registration and pulled into event reporting for specific event. These custom event fields can be tracked via reports but will not merge into event certificates.

4. Events and Adding Components

Once the event is created, you can attach the appropriate component to it on the Overview tab. This will pull in the component, code, instructor, and hours or credits that will be earned.
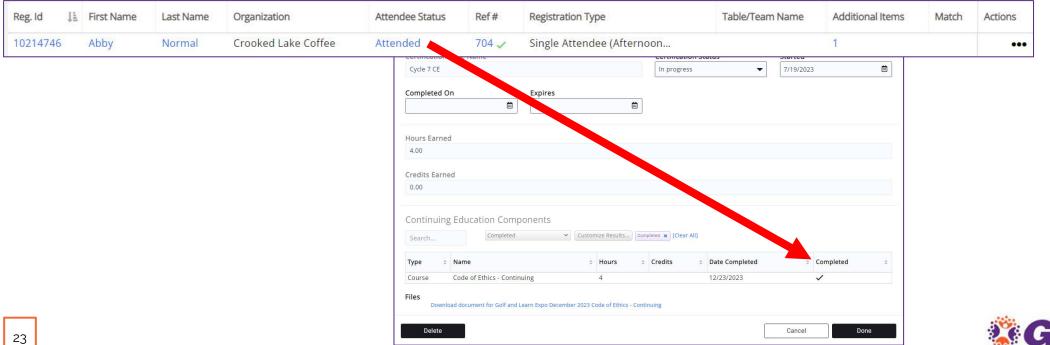

Alternatively, you can create a new component from within the event by clicking the "+" and filling out the required fields.
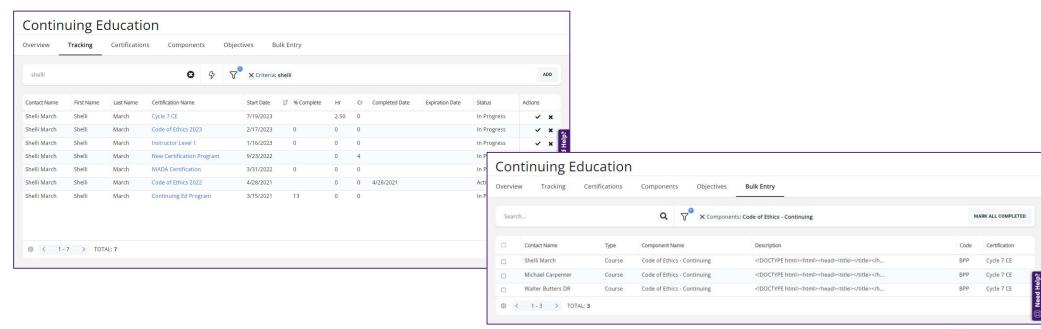
5. Complete a Component

[Marking the attendee as "Attended"](#) in that event will mark that component as completed, and will update the Code of Ethics or Fair Housing section in their Real Estate tab. It will then sync to M1.

5. Complete a Component

Alternatively, you can enter Component/Certification Results for individuals via the Tracking tab, or in bulk on the Bulk Entry tab.
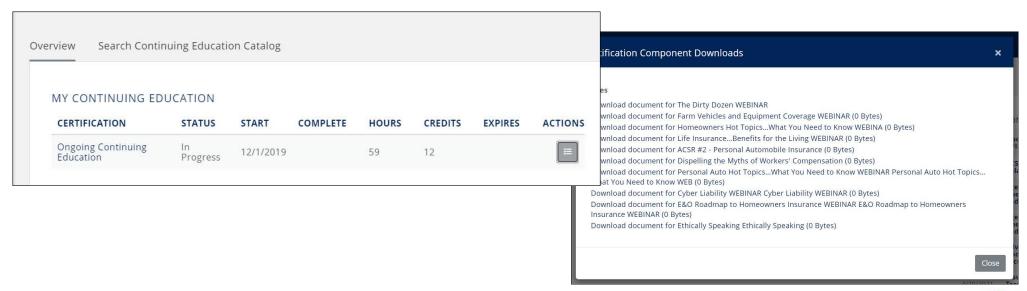
5. Complete a Component

When a component is completed, attendees will receive:
- An email with their certificate attached (after being marked as attended by staff)
- Access to their certificates in the Info Hub
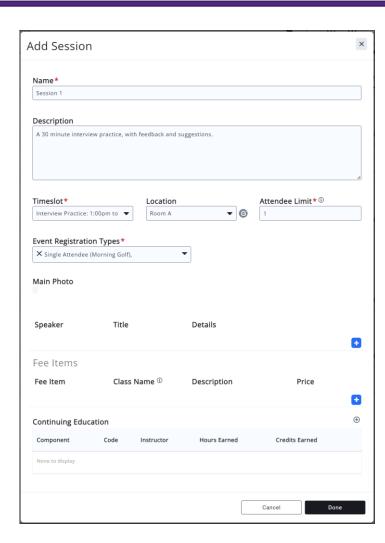
Special Case: COEC and COEN credits

We realize that there are some associations that "share" their Code of Ethics class, giving COEC and COEN credits for the same class. There are two setup options in this scenario:

Special Case: COEC and COEN credits

1. **Expo Module:** Set up sessions and assign the appropriate component to each session. The agent selects the needed session when they register for the class and will be granted the correct credit when marked as attended.

2. **No Expo Module:** Create two separate events, one for new agents and one for existing. Each event gets its own component and the agents will receive the correct credit when they are marked as attended.

Special Case: COEC and COEN credits

Knowledge Base:

Use Case: One Event, Two Components- Granting COEC and COEN Credits for a Single Class
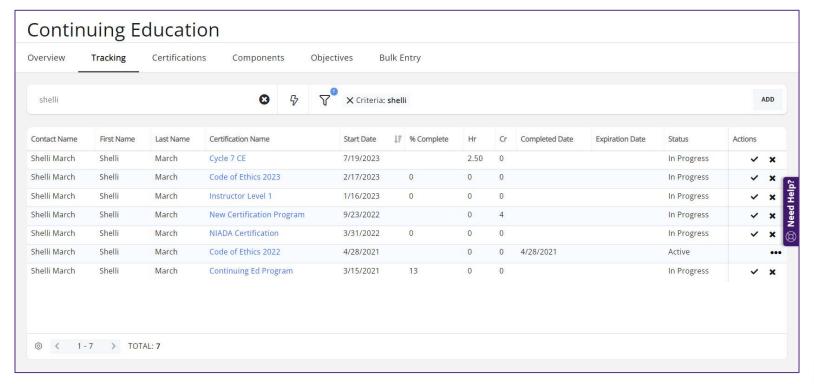
Special Case: COEC and COEN credits

If you do not subscribe to the Expo module but would like to know more about it, please contact the Engagement Team.
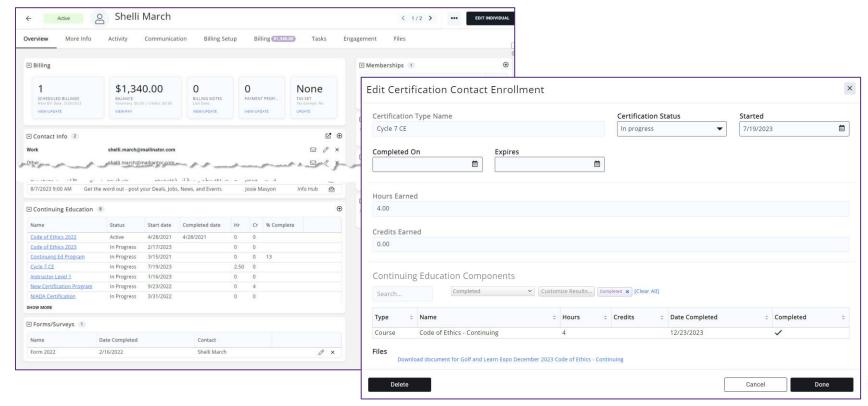
Tracking Progress

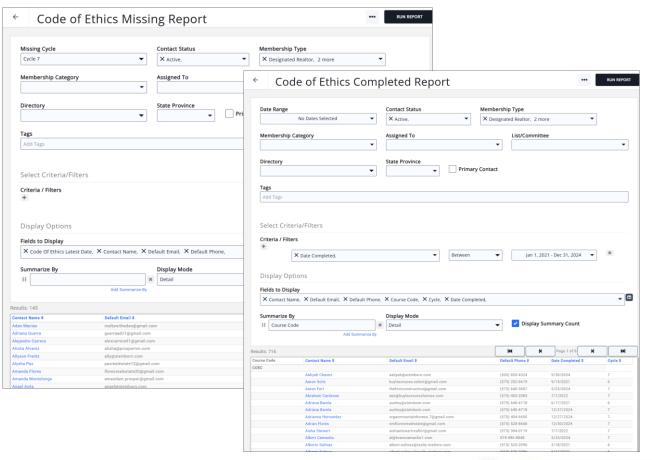You can track any/all contact's progress on the **Tracking** tab within the Certifications module.

Tracking Progress

You can also view a contact's progress and access their certificates via the Profile tab of their contact record.
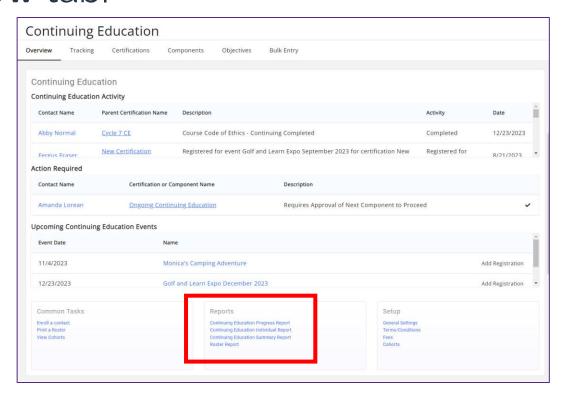
Reporting

Access the Code of Ethics and Fair Housing reports to track progress and report on agents that may be missing completions.

Reporting

Additional reports to help you view and analyze status of your certifications are available on the Continuing Education **Overview** tab.

Reporting

The Continuing Education Progress Report will provide an understanding of how an individual contact, or multiple contacts are progressing towards certification or participation in continuing education programs. The report may be filtered to a specific certification program, certification component, status, etc.

Results: 15

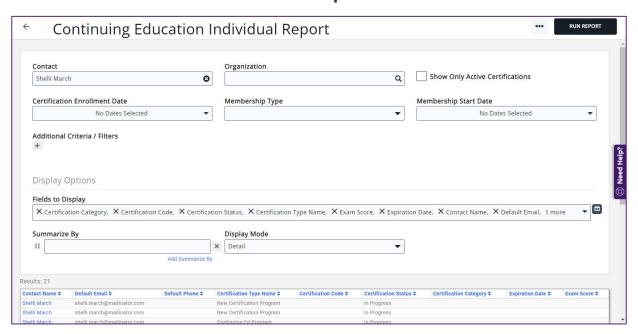| Contact Name ⇕	Default Email ⇕	Default Phone ⇕	Certification Type Name ⇕	Certification Code ⇕	Certification Status ⇕	Certification Category ⇕	Enrollment Date ⇕	Expiration Date ⇕	Component Name ⇕	Component Code ⇕	Component Type ⇕	Completion Status ⇕	% Completed ⇕
Abby Normal	abby.normal@mailinator.com	218-456-1258	Cycle 7 CE		In Progress		7/19/2023		Cycle 7 COEC		Course		33
Abby Normal	abby.normal@mailinator.com	218-456-1258	Cycle 7 CE		In Progress		7/19/2023		Code of Ethics - Continuing	BPP	Course	Completed	33
Abby Normal	abby.normal@mailinator.com	218-456-1258	Cycle 7 CE		In Progress		7/19/2023		Cycle 7 COEN		Course	Registered for Event	33
Michael Carpenter	michaelcarpenter@mailinator.com	773-554-8636	Cycle 7 CE		In Progress		7/19/2023		Cycle 7 COEC		Course		50
Walter Butters DR	walter.butters@mailinator.com	630-249-9994	Cycle 7 CE		In Progress		7/19/2023		Cycle 7 COEC		Course		50
Shelli March	shelli.march@mailinator.com		Cycle 7 CE		In Progress		7/19/2023		Cycle 7 COEC		Course		50
Michael	michaelcarpenter@mailinator.com	773-554-	Cycle 7 CE		In Progress		7/19/2023		Code of Ethics -	BPP	Course		50

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Reporting

Using the Continuing Education Summary Report, you can generate a list of all of your certifications and their associated settings (i.e. fees associated to the certification, whether the certification requires approval, number of contacts with active certificates, and so on). This report may be a quick way to verify settings for your certification programs.
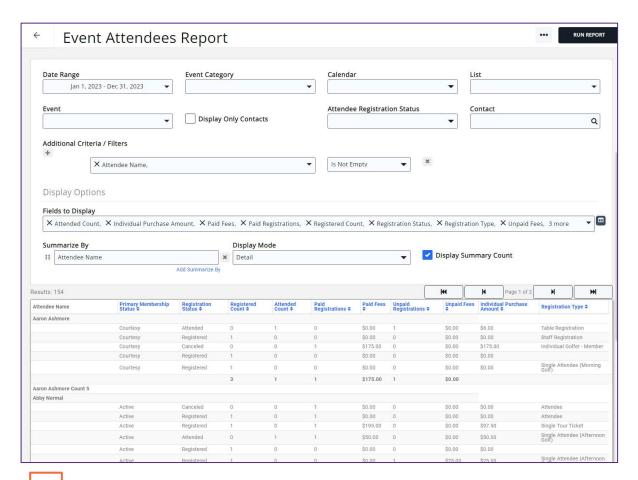
Results: 26

Certification Name	Requires Approval ⬍	Price ⬍	Fee Item ⬍	Component Name ⬍	Component Price ⬍	Component Fee Item ⬍	Component Exam Type ⬍	Number Enrolled ⬍	Number Enrolled but not completed ⬍	Number Active ⬍	Number Expired ⬍	Number Requiring Approval ⬍	Number of Objectives ⬍
Code of Ethics 2022	No			Code of Ethics 2021				25	15			10	
Code of Ethics 2023	No							2	2				
Continuing Ed Program	No			Ed Opp 1				39	39				
Continuing Ed Program	No			Test Cert Course 1				39	39				
Continuing Ed Program	No			Test Cert Course 2				39	39				
Continuing Ed Program	No			New Component				39	39				
Cycle 7 CE	No			Cycle 7 COEN				4	4				

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Reporting

The Continuing Education Individual Report provides a way for you to filter to an individual contact or organization, and display all certifications, components and/or objectives the individual has met, as well as completion date.

Reporting

The [Event Attendees Report](#) provides information on what events (classes) a contact has attended. It can be filtered and/or summarized by date, category, calendar, list, event, registration status, and more.

More Information:

Knowledge Base Articles

Continuing Education: A Simple Setup

Code of Ethics and Continuing Education

Questions?

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