

Continuing Education + Code of Ethics and Fair Housing

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

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 automatically 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

Component Details

Type	Code	Name
Course	2021C6	Code of Ethics 2021

Description
COEC certification

Fee

Item

Price

Objectives

CODE	NAME
------	------

Component Documents

None to display

Component Certificates

Component Certificates
Download document for Golf and Learn Expo Code of Ethics 2021

Close

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

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: [Custom Fields](#)

Before You Start... Custom Fields

The screenshot shows the 'Add Custom Field' dialog box with the following fields and options:

- Field Area:** A dropdown menu set to 'Individuals'.
- Name*:** An empty text input field.
- Display Name*:** An empty text input field.
- Description:** A rich text editor with a toolbar containing bold, italic, underline, link, unlink, list, and other icons.
- Custom Field Data Type:** A dropdown menu set to 'Text'.
- Group/Section:** A dropdown menu with a plus sign icon.
- Characters Allowed:** An empty text input field.
- Properties:** A section with four checkboxes: 'Public', 'Member Editable', 'Required', and 'Archived', all of which are currently unchecked.
- Advanced Options:** A checkbox that is currently unchecked.
- Buttons:** 'Cancel' and 'Done' buttons at the bottom right.

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 : [Setting up Document Templates](#)

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 : [Setting up Document Templates](#)

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: 1121C009LE

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:

A handwritten signature in cursive script that reads "Tammy Lapierre".

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, custom email templates can be created and sent manually.

GZ Knowledge Base: [Automated Messaging](#)

1. Create a Certification

Certification Checklist:

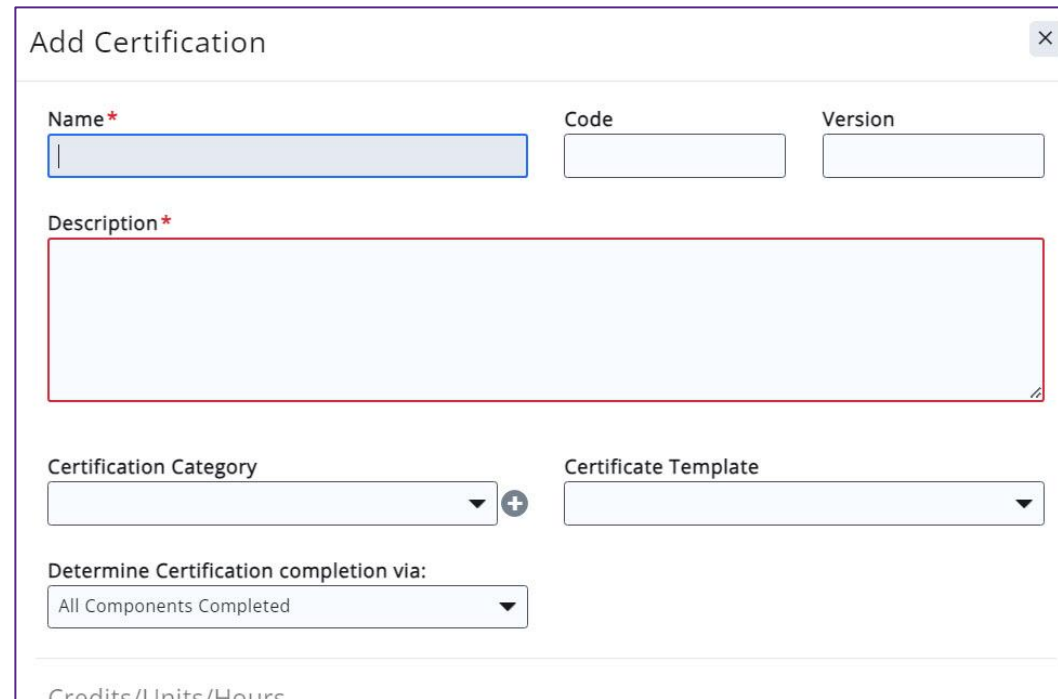
- ✓ Certification Name:
Continuing Education or Ongoing Continuing Education
- ✓ Description:
Continuing Education or Ongoing Continuing Education
- ✓ Determine Certification completion via:
Do Not Track Completion*

*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.



The screenshot shows a web form titled "Add Certification" with a close button (X) in the top right corner. The form contains the following fields:

- Name ***: A text input field.
- Code**: A text input field.
- Version**: A text input field.
- Description ***: A large text area for entering details.
- Certification Category**: A dropdown menu with a plus sign (+) to the right.
- Certificate Template**: A dropdown menu.
- Determine Certification completion via:**: A dropdown menu currently set to "All Components Completed".
- Credits/Units/Hours**: A partially visible field at the bottom of the form.

2. Set Certification as Default

Setup -> Continuing Education -> General Settings

← Setup

Continuing Education General Settings SAVE

Send Expiration Emails n Days Before ⓘ Receives Admin Review email ⓘ + Default Certificate Template

Default Certification Enroll Attendees To All Relevant Certifications

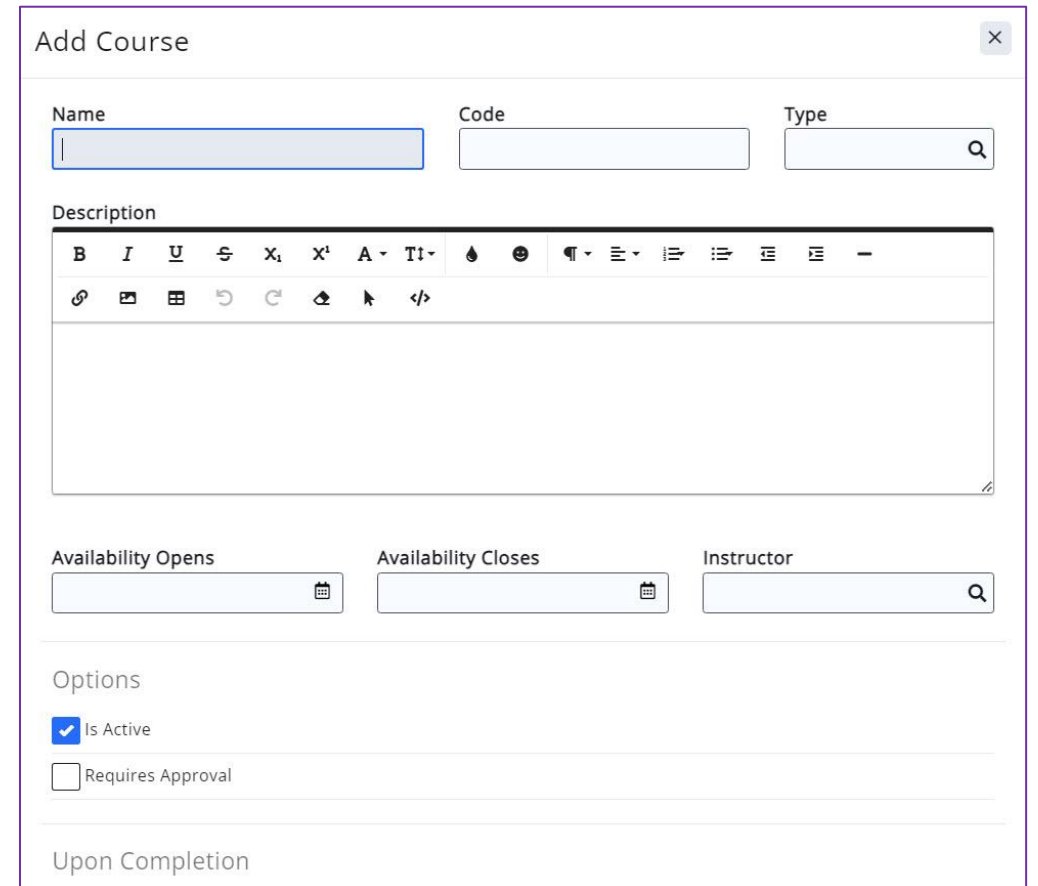
ip?

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](#)



The screenshot shows the 'Add Course' form with the following fields and options:

- Name:** A text input field.
- Code:** A text input field.
- Type:** A dropdown menu with a search icon.
- Description:** A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, undo, redo, link, unlink, and code.
- Availability Opens:** A date picker field.
- Availability Closes:** A date picker field.
- Instructor:** A dropdown menu with a search icon.
- Options:**
 - Is Active
 - Requires Approval
- Upon Completion:** A section header for additional options.

3. Create Components

The screenshot shows the 'Add Course' form with the following sections:

- Name, Code, Type:** Input fields with search icons.
- Description:** Rich text editor with a toolbar.
- Availability:** Availability Opens, Availability Closes, and Instructor fields.
- Options:** Is Active, Requires Approval.
- Upon Completion:** Hours Earned, Credits Earned, and Document Template fields.
- Objectives:** Table with columns: Objective, Code, Parent Objective.
- Prerequisites:** Table with columns: Name, Type, Code.
- Fee Items:** Table with columns: Fee Item, Price.
- Component Of:** Type (Certification), Name (Ongoing Continuing), Code, Is Active (Yes).

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.

Continuing Education +				
Component	Code	Instructor	Hours Earned	Credits Earned
COEC	COEC		8	...

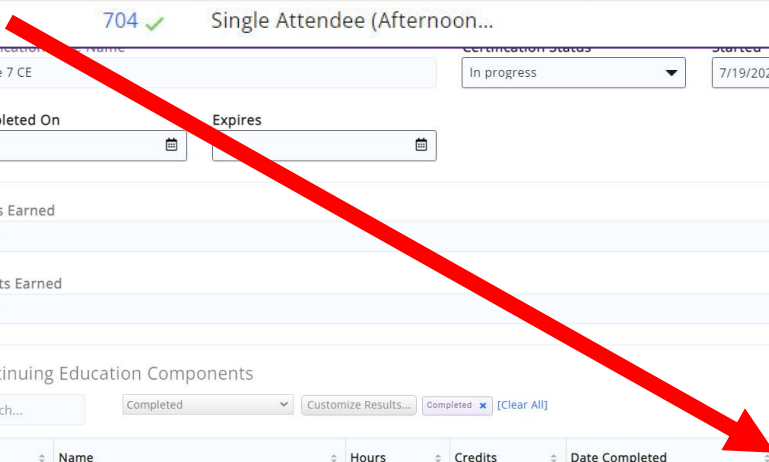
Alternatively, you can create a new component from within the event by clicking the “+” and filling out the required fields.

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.

Reg. Id	First Name	Last Name	Organization	Attendee Status	Ref #	Registration Type	Table/Team Name	Additional Items	Match	Actions
10214746	Abby	Normal	Crooked Lake Coffee	Attended	704 ✓	Single Attendee (Afternoon...		1		...

Type	Name	Hours	Credits	Date Completed	Completed
Course	Code of Ethics - Continuing	4		12/23/2023	✓



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.

Continuing Education

Overview **Tracking** Certifications Components Objectives Bulk Entry

Search: shelli

Contact Name	First Name	Last Name	Certification Name	Start Date	% Complete	Hr	Cr	Completed Date	Expiration Date	Status	Actions
Shelli March	Shelli	March	Cycle 7 CE	7/19/2023	0	2.50	0			In Progress	✓ ✕
Shelli March	Shelli	March	Code of Ethics 2023	2/17/2023	0	0	0			In Progress	✓ ✕
Shelli March	Shelli	March	Instructor Level 1	1/16/2023	0	0	0			In Progress	✓ ✕
Shelli March	Shelli	March	New Certification Program	9/23/2022	0	4				In P	
Shelli March	Shelli	March	NIADA Certification	3/31/2022	0	0	0			In P	
Shelli March	Shelli	March	Code of Ethics 2022	4/28/2021	0	0	0	4/28/2021		Act	
Shelli March	Shelli	March	Continuing Ed Program	3/15/2021	13	0	0			In P	

1 - 7 TOTAL: 7

Continuing Education

Overview Tracking Certifications Components Objectives **Bulk Entry**

Search...

Components: Code of Ethics - Continuing

Contact Name	Type	Component Name	Description	Code	Certification
Shelli March	Course	Code of Ethics - Continuing	<!DOCTYPE html><html><head><title></title></h...	BPP	Cycle 7 CE
Michael Carpenter	Course	Code of Ethics - Continuing	<!DOCTYPE html><html><head><title></title></h...	BPP	Cycle 7 CE
Walter Butters DR	Course	Code of Ethics - Continuing	<!DOCTYPE html><html><head><title></title></h...	BPP	Cycle 7 CE

1 - 3 TOTAL: 3

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

The screenshot displays a web interface for a Continuing Education Catalog. At the top, there are tabs for 'Overview' and a search bar labeled 'Search Continuing Education Catalog'. Below this, a section titled 'MY CONTINUING EDUCATION' contains a table with the following data:

CERTIFICATION	STATUS	START	COMPLETE	HOURS	CREDITS	EXPIRES	ACTIONS
Ongoing Continuing Education	In Progress	12/1/2019		59	12		[Menu Icon]

To the right of the table, a modal window titled 'Certification Component Downloads' is open, listing several documents for download, each labeled '(0 Bytes)'. The list includes:

- Download document for The Dirty Dozen WEBINAR
- Download document for Farm Vehicles and Equipment Coverage WEBINAR (0 Bytes)
- Download document for Homeowners Hot Topics...What You Need to Know WEBINA (0 Bytes)
- Download document for Life Insurance...Benefits for the Living WEBINAR (0 Bytes)
- Download document for ACSR #2 - Personal Automobile Insurance (0 Bytes)
- Download document for Dispelling the Myths of Workers' Compensation (0 Bytes)
- Download document for Personal Auto Hot Topics...What You Need to Know WEBINAR Personal Auto Hot Topics...at You Need to Know WEB (0 Bytes)
- Download document for Cyber Liability WEBINAR Cyber Liability WEBINAR (0 Bytes)
- Download document for E&O Roadmap to Homeowners Insurance WEBINAR E&O Roadmap to Homeowners Insurance WEBINAR (0 Bytes)
- Download document for Ethically Speaking Ethically Speaking (0 Bytes)

A 'Close' button is located at the bottom right of the modal window.

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

Add Session

Name*
Session 1

Description
A 30 minute interview practice, with feedback and suggestions.

Timeslot* Interview Practice: 1:00pm to **Location** Room A **Attendee Limit* ①** 1

Event Registration Types*
X Single Attendee (Morning Golf),

Main Photo

Speaker	Title	Details
---------	-------	---------

Fee Items

Fee Item	Class Name ①	Description	Price
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Continuing Education

Component	Code	Instructor	Hours Earned	Credits Earned
None to display				

Cancel Done

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.

Continuing Education

Overview **Tracking** Certifications Components Objectives Bulk Entry

shelli

Contact Name	First Name	Last Name	Certification Name	Start Date	% Complete	Hr	Cr	Completed Date	Expiration Date	Status	Actions
Shelli March	Shelli	March	Cycle 7 CE	7/19/2023		2.50	0			In Progress	✓ x
Shelli March	Shelli	March	Code of Ethics 2023	2/17/2023	0	0	0			In Progress	✓ x
Shelli March	Shelli	March	Instructor Level 1	1/16/2023	0	0	0			In Progress	✓ x
Shelli March	Shelli	March	New Certification Program	9/23/2022		0	4			In Progress	✓ x
Shelli March	Shelli	March	NIADA Certification	3/31/2022	0	0	0			In Progress	✓ x
Shelli March	Shelli	March	Code of Ethics 2022	4/28/2021		0	0	4/28/2021		Active	⋮
Shelli March	Shelli	March	Continuing Ed Program	3/15/2021	13	0	0			In Progress	✓ x

< 1 - 7 > TOTAL: 7

Need Help?

Tracking Progress

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

The screenshot displays a user interface for a contact named Shellli March. The main profile view includes sections for Billing, Contact Info, Continuing Education, and Forms/Surveys. An 'Edit Certification Contact Enrollment' modal is open, showing details for a 'Cycle 7 CE' certification. The modal includes fields for Certification Type Name, Certification Status (set to 'In progress'), Started date (7/19/2023), Completed On, Expires, Hours Earned (4.00), and Credits Earned (0.00). A table of Continuing Education Components shows a 'Code of Ethics - Continuing' course with 4 hours and 4 credits, completed on 12/23/2023. The modal also has 'Delete', 'Cancel', and 'Done' buttons.

Billing Summary:

- SCHEDULED BILLINGS: 1
- BALANCE: \$1,340.00
- BILLING NOTES: 0
- PAYMENT PROF.: 0
- TAX SET: None

Contact Info:

- Work: shelli.march@mailinator.com
- Other: shelli.march@mailinator.com

Continuing Education Table:

Name	Status	Start date	Completed date	Hr	Cr	% Complete
Code of Ethics 2022	Active	4/28/2021	4/28/2021	0	0	
Code of Ethics 2023	In Progress	2/17/2023		0	0	
Continuing Ed Program	In Progress	3/15/2021		0	0	13
Cycle 7 CE	In Progress	7/19/2023		2.50	0	
Instructor Level 1	In Progress	1/16/2023		0	0	
New Certification Program	In Progress	9/23/2022		0	4	
NIADA Certification	In Progress	3/31/2022		0	0	

Forms/Surveys Table:

Name	Date Completed	Contact
Form 2022	2/16/2022	Shellli March

Edit Certification Contact Enrollment Form:

Certification Type Name: Cycle 7 CE
Certification Status: In progress
Started: 7/19/2023
Completed On: [Empty]
Expires: [Empty]
Hours Earned: 4.00
Credits Earned: 0.00

Continuing Education Components Table:

Type	Name	Hours	Credits	Date Completed	Completed
Course	Code of Ethics - Continuing	4		12/23/2023	✓

Reporting

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

Code of Ethics Missing Report

Missing Cycle: Cycle 7
Contact Status: Active
Membership Type: Designated Realtor, 2 more

Membership Category: [Empty]
Assigned To: [Empty]
Directory: [Empty]
State Province: [Empty]

Tags: Add Tags

Select Criteria/Filters

Criteria / Filters: +

Display Options

Fields to Display: Code Of Ethics Latest Date, Contact Name, Default Email, Default Phone

Summarize By: [Empty] | Display Mode: Detail

Results: 143

Contact Name	Default Email
Adrian Macias	realtywithadrian@gmail.com
Adriana Guerra	guerradr1@gmail.com
Alejandro Carrera	alexcarrera91@gmail.com
Alisha Alvarez	alisha@prospernm.com
Allyson Frantz	ally@steinborn.com
Alysha Paz	pazrealstate12@gmail.com
Amanda Flores	floresrealstate20@gmail.com
Amanda Montelongo	amandam.prosper@gmail.com
Angel Ayala	angel@steinborn.com

Code of Ethics Completed Report

Date Range: No Dates Selected
Contact Status: Active
Membership Type: Designated Realtor, 2 more

Membership Category: [Empty]
Assigned To: [Empty]
List/Committee: [Empty]
Directory: [Empty]
State Province: [Empty]
Primary Contact: [Empty]

Tags: Add Tags

Select Criteria/Filters

Criteria / Filters: +
Date Completed: [Empty] Between Jan 1, 2021 - Dec 31, 2024

Display Options

Fields to Display: Contact Name, Default Email, Default Phone, Course Code, Cycle, Date Completed

Summarize By: Course Code | Display Mode: Detail | Display Summary Count: [Checked]

Results: 716

Course Code	Contact Name	Default Email	Default Phone	Date Completed	Cycle
COEC	Aaliyah Chavez	aaliyah@steinborn.com	(505) 835-4324	9/30/2024	7
	Aaron Sola	boylsresources.aaron@gmail.com	(575) 205-6619	9/14/2021	6
	Aaron Fort	thefortconstruction@gmail.com	(575) 640-3607	5/23/2024	7
	Abraham Cardenas	abe@boylsresources.com	(575) 405-2983	7/7/2022	7
	Adriana Barcia	audrey@steinborn.com	(575) 640-4718	6/17/2021	6
	Adriana Barcia	audrey@steinborn.com	(575) 640-4718	12/27/2024	7
	Adriana Hernandez	organmountainhomes.7@gmail.com	(575) 404-6650	12/27/2024	7
	Adrian Flores	nfnfloresrealstate@gmail.com	(575) 528-8668	12/30/2024	7
	Aisha Stewart	aishastewartrealtor@gmail.com	(575) 904-0119	7/7/2022	7
	Albert Canabcho	albertcanabcho1.com	575-996-8848	5/23/2024	7
	Alberto Salinas	albert.salinas@realty-matters.com	(913) 525-2096	3/18/2021	6
	Alba Vazquez	alba.vazquez@realty-matters.com	(913) 656-3804	4/13/2021	6

Reporting

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

Continuing Education

Overview Tracking Certifications Components Objectives Bulk Entry

Continuing Education Activity

Contact Name	Parent Certification Name	Description	Activity	Date
Abby Normal	Cycle 7 CE	Course Code of Ethics - Continuing Completed	Completed	12/23/2023
Frederic Fraser	New Certification	Registered for event Golf and Learn Expo September 2023 for certification New	Registered for	8/21/2023

Action Required

Contact Name	Certification or Component Name	Description
Amanda Lorean	Ongoing Continuing Education	Requires Approval of Next Component to Proceed

Upcoming Continuing Education Events

Event Date	Name
11/4/2023	Monica's Camping Adventure
12/23/2023	Golf and Learn Expo December 2023

Common Tasks

- Enroll a contact
- Print a Roster
- View Cohorts

Reports

- Continuing Education Progress Report
- Continuing Education Individual Report
- Continuing Education Summary Report
- Roster Report

Setup

- General Settings
- Terms/Conditions
- Fees
- Cohorts

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

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				

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.

Continuing Education Individual Report

Contact: Shelli March

Organization: [Search]

Membership Start Date: No Dates Selected

Fields to Display: X Certification Category, X Certification Code, X Certification Status, X Certification Type Name, X Exam Score, X Expiration Date, X Contact Name, X Default Email, 1 more

Display Mode: Detail

Results: 21

Contact Name	Default Email	Default Phone	Certification Type Name	Certification Code	Certification Status	Certification Category	Expiration Date	Exam Score
Shelli March	shelli.march@mailinator.com		New Certification Program		In Progress			
Shelli March	shelli.march@mailinator.com		New Certification Program		In Progress			
Shelli March	shelli.march@mailinator.com		Continuing Ed Program		In Progress			

Reporting

Event Attendees Report RUN REPORT

Date Range: Jan 1, 2023 - Dec 31, 2023 | Event Category: | Calendar: | List: |

Event: | Display Only Contacts | Attendee Registration Status: | Contact: |

Additional Criteria / Filters:
 Attendee Name, | Is Not Empty

Display Options:
 Fields to Display: Attended Count, Individual Purchase Amount, Paid Fees, Paid Registrations, Registered Count, Registration Status, Registration Type, Unpaid Fees, 3 more

Summarize By: Attendee Name | Display Mode: Detail | Display Summary Count

Results: 154 | Page 1 of 2

Attendee Name	Primary Membership Status	Registration Status	Registered Count	Attended Count	Paid Registrations	Paid Fees	Unpaid Registrations	Unpaid Fees	Individual Purchase Amount	Registration Type
Aaron Ashmore										
	Courtesy	Attended	0	1	0	\$0.00	1	\$0.00	\$6.00	Table Registration
	Courtesy	Registered	1	0	0	\$0.00	0	\$0.00	\$0.00	Staff Registration
	Courtesy	Canceled	0	0	1	\$175.00	0	\$0.00	\$175.00	Individual Golfer - Member
	Courtesy	Registered	1	0	0	\$0.00	0	\$0.00	\$0.00	
	Courtesy	Registered	1	0	0	\$0.00	0	\$0.00	\$0.00	Single Attendee (Morning Golf)
Aaron Ashmore Count 5			3	1	1	\$175.00	1	\$0.00		
Abby Normal										
	Active	Canceled	0	0	1	\$0.00	0	\$0.00	\$0.00	Attendee
	Active	Registered	1	0	1	\$0.00	0	\$0.00	\$0.00	Attendee
	Active	Registered	1	0	1	\$195.00	0	\$0.00	\$97.50	Single Tour Ticket
	Active	Attended	0	1	1	\$50.00	0	\$0.00	\$50.00	Single Attendee (Afternoon Golf)
	Active	Registered	1	0	0	\$0.00	0	\$0.00	\$0.00	
	Active	Registered	1	0	0	\$0.00	1	\$25.00	\$25.00	Single Attendee (Afternoon

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?