

**Continuing
Education + Code
of Ethics =
Automatic M1
Updates**

Agenda

- Continuing Education Overview
- Before you start...
- Setting things up!
 - Create Certification
 - Set Certification as Default
 - Create Component(s)
 - Add Components to Events
 - Complete a Component
- 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 module is built so that both simple and complex scenarios can be accommodated. It is important to note that the Continuing Education module does not deliver instruction or coursework, rather, it keeps track of necessary elements and the completion date of each.

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 section on the Real Estate tab after a registrant is marked as attended.

If you do not have GrowthZone's Continuing Education module and are interested in adding it to your subscription, contact the Engagement Team.

Continuing Education Overview

Continuing Education- The Simple Setup

This Continuing Education/Code of Ethics 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

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](#)

Custom Fields

Add Custom Field

Field Area
Individuals

Name Display Name

Description

Custom Field Data Type: Text
Group/Section: -- Select a Group/Section --
Characters Allowed:

Properties

Public Member Editable Required Archived

Advanced Options Cancel Done

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.

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
- Roster Templates

GZ Knowledge Base : [Setting up Document Templates](#)

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](#)

Document Generation



Certificate of Completion

Name: [REDACTED]

Real Estate License Number: [REDACTED]

Address:

Course Title: Code of Ethics

Course Certification Number: [REDACTED]

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

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.

You will probably want to customize the template, as in its default state it is simply a list of fields!

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

Document Generation

Roster Templates

Many certifying bodies like state governments and national organizations require proof that an individual has attended a training class. In GrowthZone, you can create rosters for events that are linked to certification components by using the Mail Merge option on the **Continuing Education Roster Report**.

GZ Knowledge Base: [Setting up Document Templates](#)

Document Generation

Roster Templates

GrowthZone has a template called **CertificationRoster.docx**. You can make a copy of this document and edit it or upload your own file using merge fields.

See [Continuing Education/Certificates Merge Fields](#) for available merge fields for use in Component Certificate Templates.

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](#)

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](#)

Create a Certification

Certification Checklist:

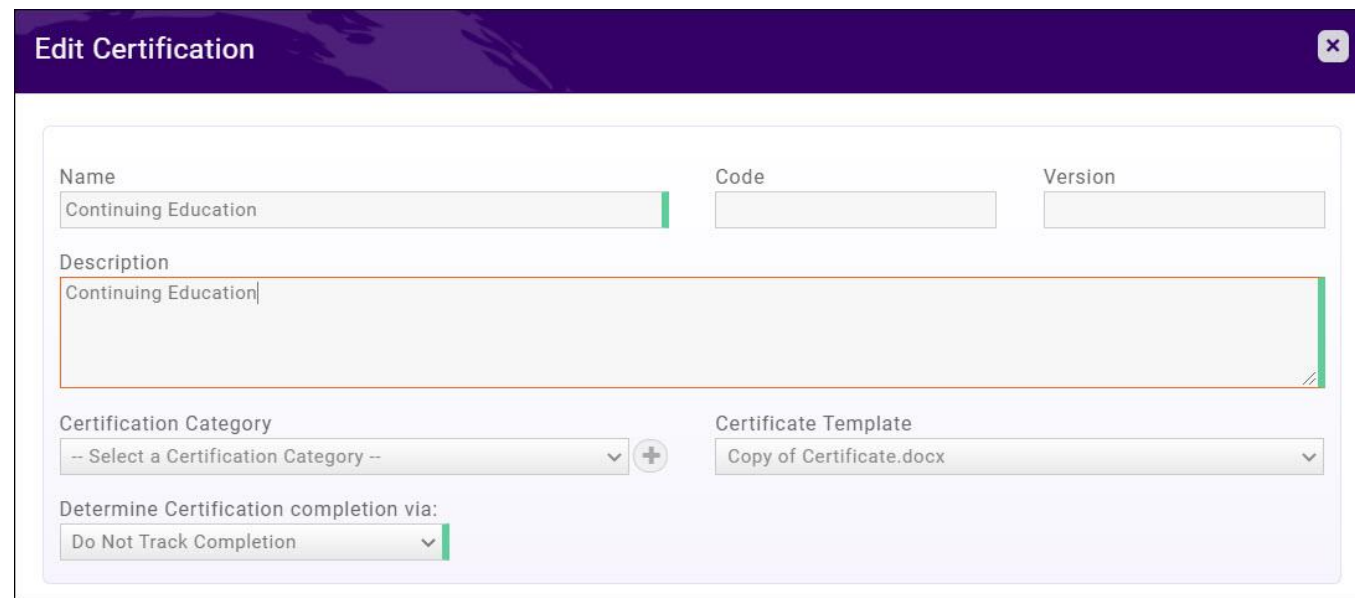
- ✓ Certification Name:
Continuing Education or Ongoing Continuing Education
- ✓ Description:
Continuing Education or Ongoing Continuing Education
- ✓ Determine Certification completion via:
Do Not Track Completion*

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

GZ Knowledge Base: [Add a Certification](#)

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 "Edit Certification" with a close button in the top right corner. The form contains the following fields:

- Name:** A text input field containing "Continuing Education".
- Code:** An empty text input field.
- Version:** An empty text input field.
- Description:** A large text area containing "Continuing Education".
- Certification Category:** A dropdown menu with the text "-- Select a Certification Category --" and a plus sign icon to its right.
- Certificate Template:** A dropdown menu with the text "Copy of Certificate.docx".
- Determine Certification completion via:** A dropdown menu with the text "Do Not Track Completion".

Set Certification as Default

Setup -> Continuing Education -> General Settings

[Back to Setup](#)

Continuing Education General Settings

Send 'Certification Expiring' Emails n Days Before Expiration:

List/Committee that receives Admin Review Required email: -- Select a List/Committee that receives Admin Review Rec v +

Default Certificate Template: -- Select a Default Certificate Template -- v

Default Certification:

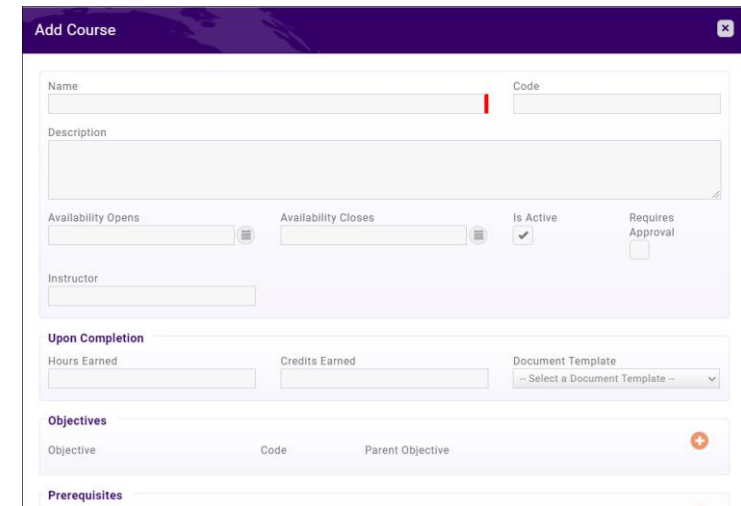
Enroll Attendees To All Relevant Certifications:

[Save](#)

GZ Knowledge Base : [Continuing Education General Settings](#)

Create Components

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



The screenshot shows a web form titled "Add Course" with the following fields and sections:

- Name** and **Code**: Text input fields.
- Description**: A large text area.
- Availability Opens** and **Availability Closes**: Date pickers.
- Is Active**: A checked checkbox.
- Requires Approval**: An unchecked checkbox.
- Instructor**: A text input field.
- Upon Completion**: A section containing:
 - Hours Earned** and **Credits Earned**: Text input fields.
 - Document Template**: A dropdown menu with the option "-- Select a Document Template --".
- Objectives**: A table with columns for **Objective**, **Code**, and **Parent Objective**, and a plus icon to add new entries.
- Prerequisites**: A section with a plus icon to add new entries.

GZ Knowledge Base: [Add a Component](#)

Create Components

The screenshot shows the 'Edit Course' form with the following details:

- Name:** COEC
- Code:** COEC
- Type:** COEC
- Description:** Component for all COEC classes.
- Is Active:**
- Upon Completion:**
 - Hours Earned: [Field]
 - Credits Earned: [Field]
 - Document Template: [Dropdown menu]
- Component Of:**
 - Type: Certification
 - Name: Continuing Education

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 or COEN** (you will need to make one component for each COE type) **IMPORTANT!** For the component to automatically update the Code of Ethics fields on the Real Estate tab, 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 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.**

Events/Education Classes

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](#)

Events/Education Classes




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.

Add Components to Events

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	Actions
Test Cert Course 1	ABC123	Shelly Test	2		 

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

Complete a Component

Marking the attendee as “Attended” in that event will mark that component as completed, and will update the Code of Ethics section in their Real Estate tab. It will then sync to NRDS/M1.

The screenshot displays a software interface with two main components. On the left, a modal window titled "Edit Attendance/No-Shows" is open. It features a search bar and a table with the following data:

Status	First Name	Last Name	Organization	Attended/Showed
Attended	Ivy	Archive	Shelly's DB INTERNAL	No
Attended	Cally	Cupcakes	Bay Lake Coffee	Yes
Attended	Cally	Cupcakes	Cally's Cupcakes	Yes
Attended	Jamie	Fraser	Fraser's Ridge	Yes
Attended	Claire	Fraser	Fraser's Ridge	Yes
Attended	Fergus	Fraser	Fraser's Ridge	Yes
Attended	Jared	Kincaid	Shelly's DB INTERNAL	Yes
Attended	Cersei	Lannister	King's Landing	Yes

Below the table are "Cancel" and "Done" buttons. An orange button labeled "Set all to Attended" is also visible. On the right, a main application window shows a profile for "MLS - CoreLogic". A red box highlights the "Code of Ethics" section, which contains the following table:

Training Date	Course Code	Course Number	Course Year	Association
11/16/2021	COEC	2021C6	2021	7075

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]

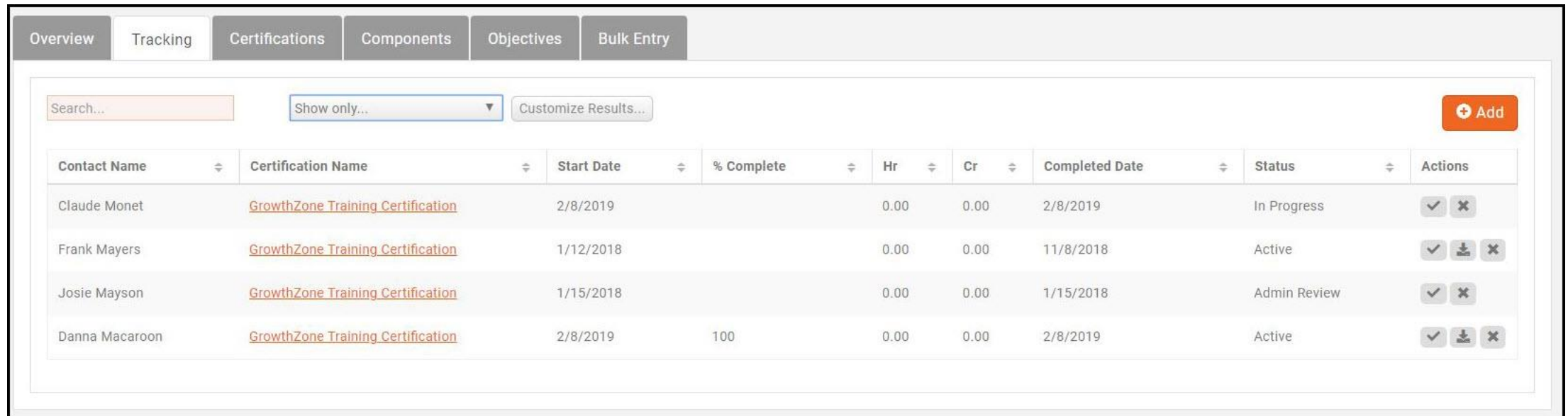
To the right of the table, a modal window titled 'Certification Component Downloads' is open, listing several documents for download, each labeled '(0 Bytes)'. The list includes:

- 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.

Tracking Progress

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



The screenshot shows the 'Tracking' tab in the Certifications module. At the top, there are navigation tabs: Overview, Tracking (selected), Certifications, Components, Objectives, and Bulk Entry. Below the tabs, there is a search bar, a 'Show only...' dropdown, and a 'Customize Results...' button. An orange '+ Add' button is in the top right corner. The main content is a table with the following columns: Contact Name, Certification Name, Start Date, % Complete, Hr, Cr, Completed Date, Status, and Actions. The table contains four rows of data.

Contact Name	Certification Name	Start Date	% Complete	Hr	Cr	Completed Date	Status	Actions
Claude Monet	GrowthZone Training Certification	2/8/2019		0.00	0.00	2/8/2019	In Progress	✓ ✕
Frank Mayers	GrowthZone Training Certification	1/12/2018		0.00	0.00	11/8/2018	Active	✓ ⬇ ✕
Josie Mayson	GrowthZone Training Certification	1/15/2018		0.00	0.00	1/15/2018	Admin Review	✓ ✕
Danna Macaroon	GrowthZone Training Certification	2/8/2019	100	0.00	0.00	2/8/2019	Active	✓ ⬇ ✕

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 software interface with a contact's profile on the left and a modal window for editing certification enrollment on the right.

Profile Tab (Left): The 'Profile' tab is selected. It shows various sections: Contact Info, Memberships, Related Individuals, Professional, Communication, Lists/Committees, Activity, Categories, and Assigned Staff. A red box highlights the 'Continuing Education' section at the bottom, which contains a table with the following data:

Name	Status	Start Date	Completed Date	Hr	Cr	Actions
Ongoing Continuing Education	In Progress	12/1/2019		12	12	

Edit Certification Contact Enrollment Modal (Right): This modal window allows for editing certification details. It includes fields for Certification Program (Ongoing Continuing Education), Certification Status (In progress), Started (12/1/2019), Completed On, and Expires. It also displays summary statistics: Hours Earned (12.00) and Credits Earned (12.00). Below this is a 'Continuing Education Components' section with a search bar and a table of completed courses:

Type	Name	Hours	Credits	Date Completed	Completed
Course	E&O Roadmap to Homeowners Insurance WEBINAR	3	3	12/17/2020	✓
Course	Cyber Liability WEBINAR	3	3	12/17/2020	✓
Course	Personal Auto Hot Topics...What You Need to Know WEB	3	3	12/16/2020	✓
Course	Ethically Speaking	3	3	3/24/2021	✓

The modal also includes a 'Files' section with download links for the courses listed in the table above. At the bottom of the modal are 'Delete', 'Cancel', and 'Done' buttons.

Reporting

Access the **Code of Ethics – Agents** report to track progress and report on agents that may be missing completions.

Back

Code of Ethics - Agents Run Report

Contact Type: Agent | Membership Status: None Selected | Membership Type: None Selected | Membership Level: None Selected

Membership Category: None Selected | Tags: Add Tags | State Province: None Selected | Missing Code of Ethics for Current Cycle:

Select Criteria/Filters

Criteria / Filters: +

Display Options

Fields to Display: Contact Name, Default Email, Default Phone, Primary Business, Code of Ethics Latest Course Number, Code of Ethics Latest Date, Code of Ethics Latest Year, MLS ID, NRDS ID

Summarize By: | Display Mode: Detail

Results: 1387 Page 1 of 14

Contact Name	Default Email	Default Phone	Primary Business	Code of Ethics Latest Date	Code of Ethics Latest Course Number	Code of Ethics Latest Year	NRDS ID	MLS ID
Jodie Mosher-Towle	jmoshertowle@cbplourde.com	(207) 432-6005	Coldwell Banker Plourde Real E	11/10/2021	2021C6	2021	466501363	
Stephen Robe	srobe@canacre.com	(207) 680-8031	Canacre (USA) Brokerage Inc	11/8/2021	2021C6	2021	467500308	
Paul Emery	emeryp@myfairpoint.net	(207) 474-9553	Allied Realty	11/7/2021	2021C6	2021	466500131	
Shawna Wells	ShawnaWells@outlook.com	(207) 622-2220	Vallee Harwood & Blouin Real Estate	11/3/2021	2021C6	2021	466501144	
Samuel Punderson	spunderson@sugarloaf.com	(207) 237-2100	Mountainside Real Estate	10/31/2021	2021C6	2021	83600405	
Kristina Stewart	kstewart@rizzomattson.com	(207) 557-4644	Coldwell Banker Rizzo Mattson	10/27/2021	2021C6	2021	466501153	
Michael Laflin	Mike@LaflinWolfingtonRealty.com	(207) 629-9211	Laflin & Wolfington Realty Inc	10/25/2021	2021C6	2021	466500370	
Anna Boucher	annaboucher@rizzomattson.com	207-622-9000	Coldwell Banker Rizzo Mattson	10/22/2021	2021C6	2021	466500635	
David Coughlin	chiefofd@hotmail.com	(207) 620-8212	Brookwood Realty	9/29/2021	2021C6	2021	466500195	
Barbara Larson	bklarson@sugarloaf.com	(207) 779-6427	Mountainside Real Estate	9/28/2021	2021C6	2021	83600369	
Richard Sutter Jr	richsutter@legacyhi.com	(207) 242-5802	LHI Realty LLC	9/1/2021	2021C6	2021	466501021	

Reporting

Broker Filter

Membership Type(s): None Selected

Level: None Selected

Membership Status: -- No Choice --

Exclude Tag(s): Add Exclude Tag(s)

Invoice Date: No Dates Selected

Open Balance:

Missing Code of Ethics:

Cancel Done

You can also filter the Broker tab to “Missing Code of Ethics” and email your brokers a list of their agents that have not yet completed their COE for the cycle!

You are currently in a staging database. Please note: any changes made to the data in this database will not transfer to your live database.

Memberships Submitted Applications Unpaid Brokers **InDevelopment**

Search... Customize Results... Missing Code of Ethics x Clear All

Actions

Email Missing Code of Ethics

Broker Name	Email	Offices	Agents	Open Invoices	Balance	Actions
Adrianna Wicks	awicks@mailinator.com	1	4	2	\$105.00	Email Invoices Print Invoices
Alicia Murphy	alicia.murphy@mailinator.com	1	2	1	\$152.50	1
Christa Anderson	christa.anderson@mailinator.com	1	1	<No Open Invoices>	\$0.00	1
Cynthia Allen	cindy@lightblast.net	1	2	1	\$152.50	2

Actions

More Information:

Knowledge Base Articles

[Continuing Education: A Simple Setup](#)

[Code of Ethics and Continuing Education](#)

[Code of Ethics – Agents Report](#)

[Broker Tab](#)

Questions?

Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: [GrowthZone Knowledge Base](#) »

Online Training Calendar: [Training Event Calendar](#) »

Live Chat: [GrowthZone Support Portal \(chat on far right\)](#) »