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

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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.

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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.

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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 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 <u>the Engagement Team</u>.

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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
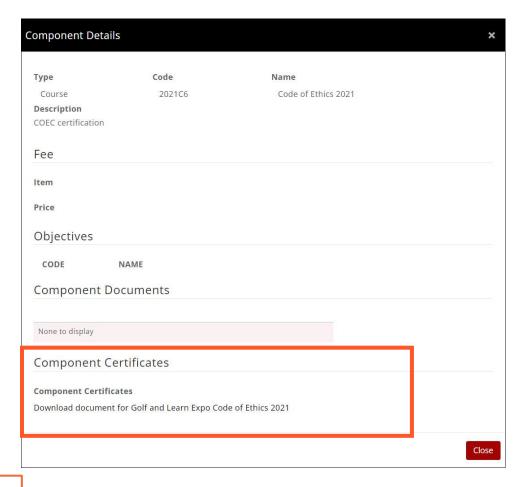*No Terms & Conditions are necessary*
No need to track "completion"- only tracking attendance/hours to update the Code of Ethics data being sent to NRDS/M1

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!

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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

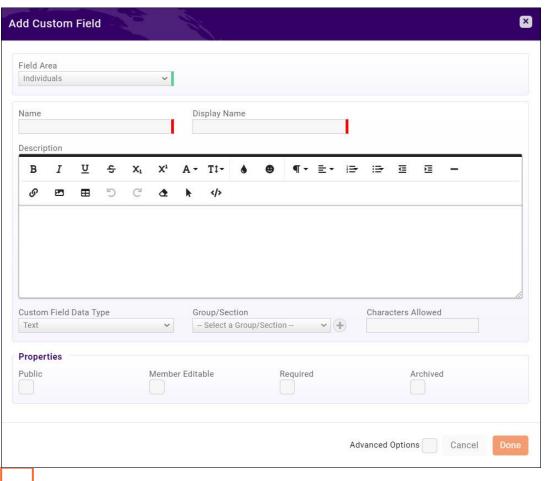GrowthZone
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Custom Fields

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

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:
Real Estate License Number:
Address:
Course Title: Code of Ethics
Course Certifiction Number:
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

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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: <u>Automated Messaging</u>

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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>

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.

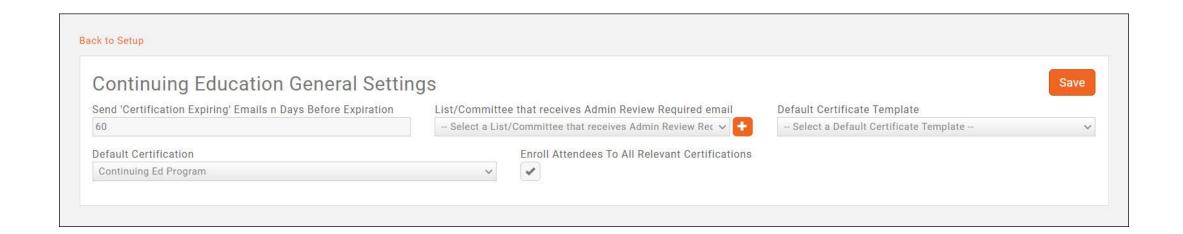GZ Knowledge Base: Add a Certification

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.

Set Certification as Default

Setup -> Continuing Education -> General Settings

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.

GZ Knowledge Base: Add a Component

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** 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.

Complete a Component
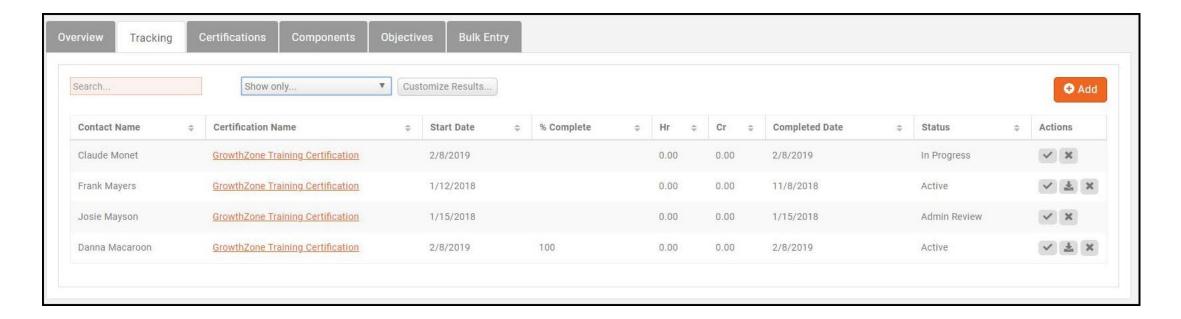
When a component is completed, attendees will receive:

- An email with their certificate attached (after being marked as attended by staff)
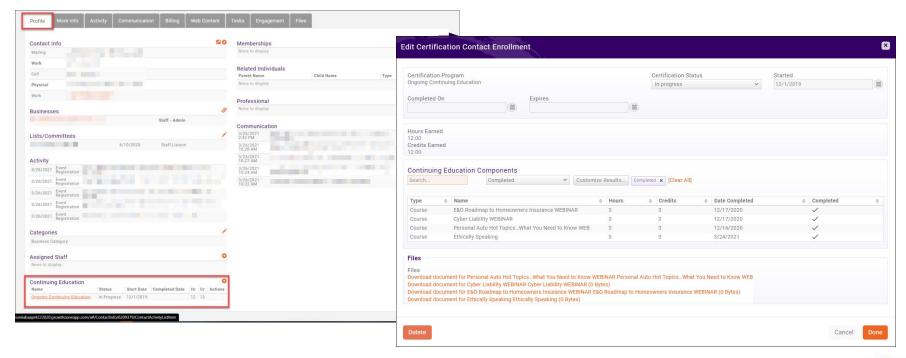- Access to their certificates in the Info Hub

Tracking Progress

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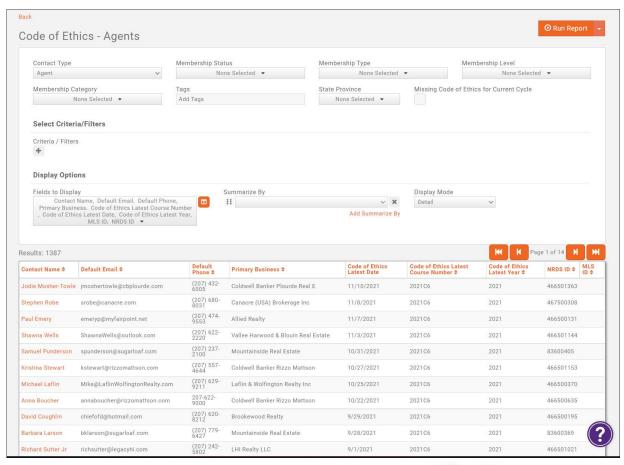
Tracking Progress

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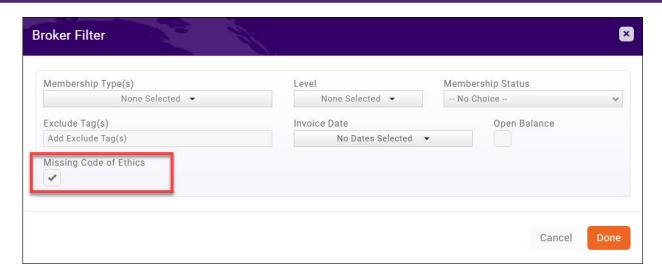
Reporting

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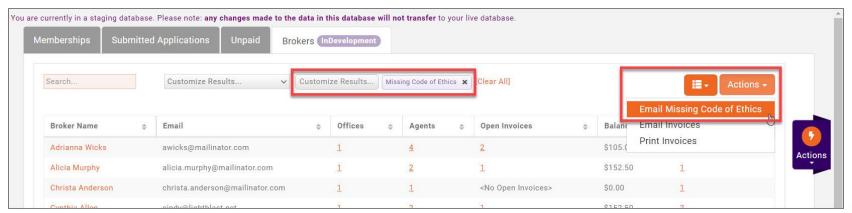
Reporting

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!

More Information:

Knowledge Base Articles

Continuing Education: A Simple Setup
Code of Ethics and Continuing Education
Code of Ethics – Agents Report
Broker Tab

Questions?

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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) »