



AGENCY MANAGER GUIDE

CERTIFYING A 1:1 HOMEOWNERSHIP
ADVISING SESSION & ACCESSING
CERTIFICATES



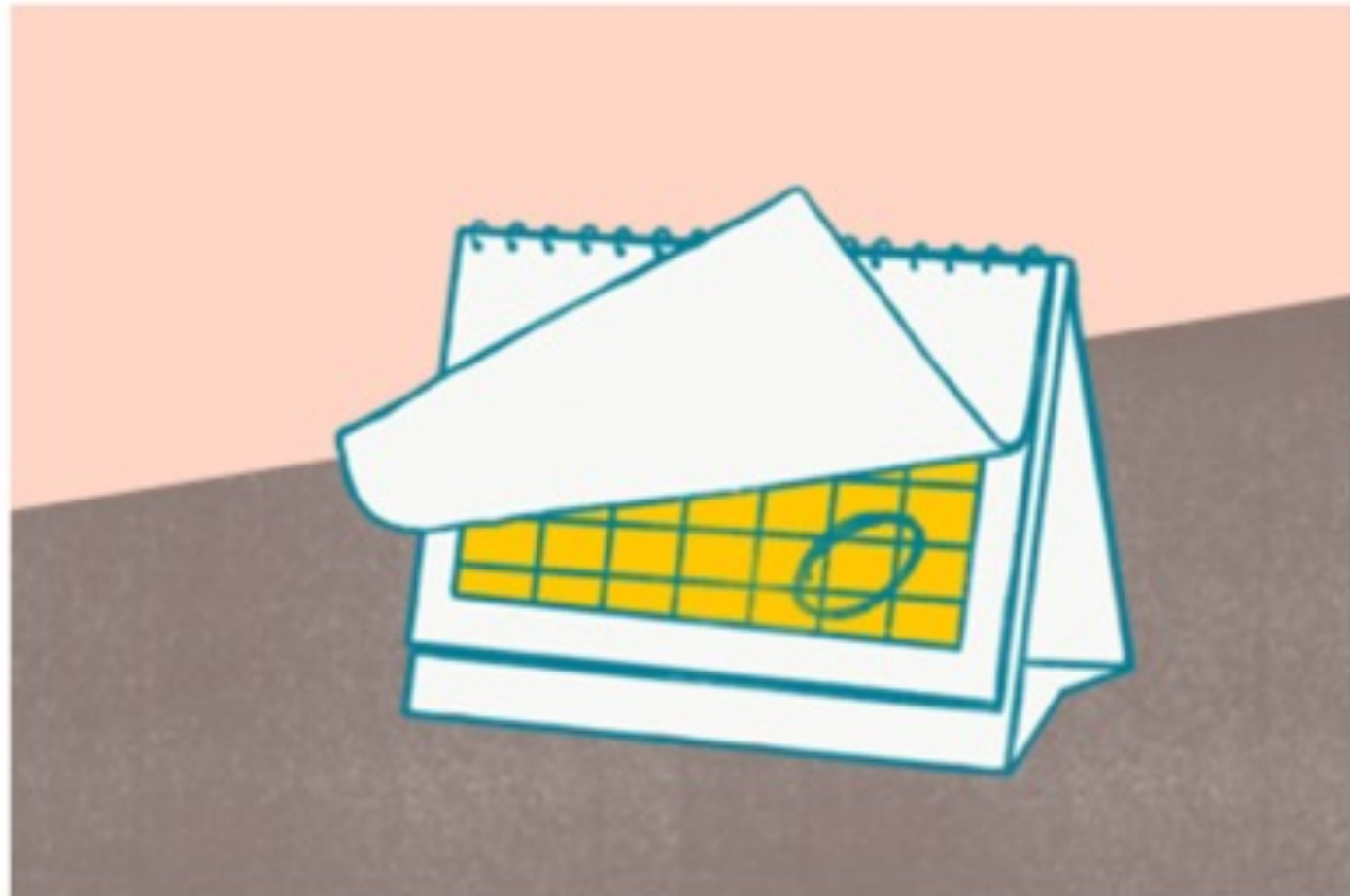
The User Experience

ADVISING SESSION REQUIRED

Prior to receiving your Certificate of Completion, you are required to complete a one-on-one homeownership advising session in person or by telephone. You'll be able to schedule your advising session once you've completed all 7 lesson quizzes with an overall score of 80%.

REQUIRED
CONTENT

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REQUIRED

Advising Session Required


Prior to receiving your Certificate of Completion, you are required to complete a one-on-one homeownership advising session in person or by telephone.


Start

Once a learner completes all 7 lessons and scores 80% or higher on each lesson quiz, they will be able to access the advising activity.

The User Experience

Schedule Your Advising Session





Schedule Your Advising Session

Prior to receiving your Certificate of Completion, you are required to complete a one-on-one homeownership advising session in person or by telephone.

To schedule your advising session, please contact:

Your Organization Name
Contact Name
000-000-0000
email@address.com

Your submission has been received Today at 2:52 PM.

Typed Submission:

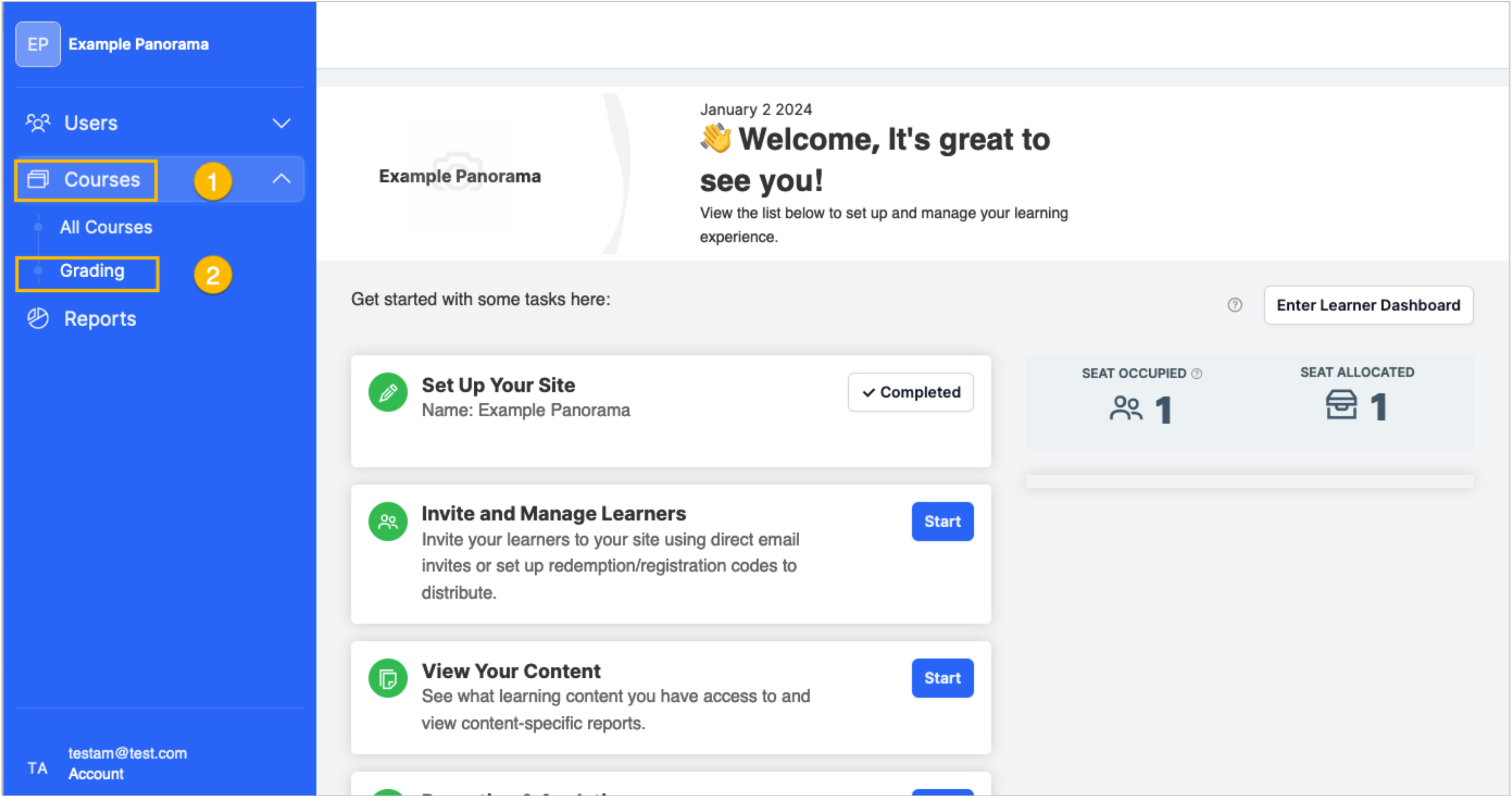
User Name

When a learner enters the activity, they will see your agency's contact information and instructions for scheduling their advising session.

The learner's name is also automatically submitted into the system, prompting the advising activity to appear within the grading section of your admin account so that you can mark the advising session as complete once it has taken place.

AGENCY MANAGER EXPERIENCE

- 1. To start, log in to your manager account
- 2. Next, navigate to “Courses” then select “Grading”



AGENCY MANAGER EXPERIENCE

3. From this page, search for the learner to approve by entering the learner’s name in the search bar in the upper left.

4. Once you’ve located the learner whose session you’d like to approve, click on the row with their name.

5. From the page that appears, click on the dropdown under “Status” and select completed. Then click “Save grade.”

Editing Client: Example Panorama / All Client Assignment Submissions

Search by Learner, Course, or Assignment Name

Assignment	Course	Learner	Date	Grade
Schedule Your Advising Session	Advising Session Required Copy	Test SB User	Today at 10:50 AM	

Grades denoted with a * have been changed by an administrator.

User Name Entered Here

TU

Test SB User

Advising Session Required Copy
Schedule Your Advising Session

Submitted January 2, 2024 10:50 AM CST

Grade

0

Status

✓ Select a grade
Incomplete
Completed

Enter submission feedback (optional)

Grade

0

Status

Completed

Enter submission feedback (optional)

Save Grade

CERTIFICATE REQUIREMENTS & ACCESS

The following steps MUST be completed for a user to receive their certificate:

- Learner must complete all 7 lessons and score 80% on each lesson quiz.
- Agency Manager must approve the 1:1 session as demonstrated in the previous pages.

Upon completion of the above, the certificate will generate, and both learner and agency manager will have access.

To access learner certificates from your manager view:

- From the left main menu, select users then learners
- Locate the user and click on their name
- Go to the transcript tab
- Click “view certificate” next to the course name

The screenshot illustrates the process to access learner certificates within the Example Panorama system. It is divided into two main sections: a menu navigation area and a user details/transcript area.

Menu Navigation: A blue sidebar menu on the left contains the following items: "Example Panorama" (logo), "Sublicenses", "Users" (highlighted with a yellow box and labeled with a yellow callout '1'), and "Learners" (highlighted with a yellow box and labeled with a yellow callout '2').

User Details: The main content area shows the "Editing Client: Example Panorama / All Client Learners" view. It includes a search bar with the text "test" and a settings icon. Below this is a table with columns: "Name", "Email", "Last Active", and "Sublicense". A user entry is shown with "Test SB User" (highlighted with a yellow box and labeled with a yellow callout '3'), "test@testing123.com", "Jan 2nd, 2024", and a "Main" sublicense.

Transcript View: Below the user details, the "Transcript" tab is selected (highlighted with a yellow box and labeled with a yellow callout '4'). The transcript page shows the "Framework" logo and buttons for "Print Transcript" and "Export Transcript CSV". It displays a table titled "EXAMPLE PANORAMA TRANSCRIPT" with the following columns: "Learner Name", "Title", "Date of Completion", "View Certificate", "Certificate ID", "Co-Borrower First Name", and "Co-Borrower Last Name".

Learner Name	Title	Date of Completion	View Certificate	Certificate ID	Co-Borrower First Name	Co-Borrower Last Name
Test SB User	Sandbox FW HBE Course + Advising	January 02, 2024	View (highlighted with a yellow box and labeled with a yellow callout '5')	t0g8iscdv6		
Test	Advising Session					

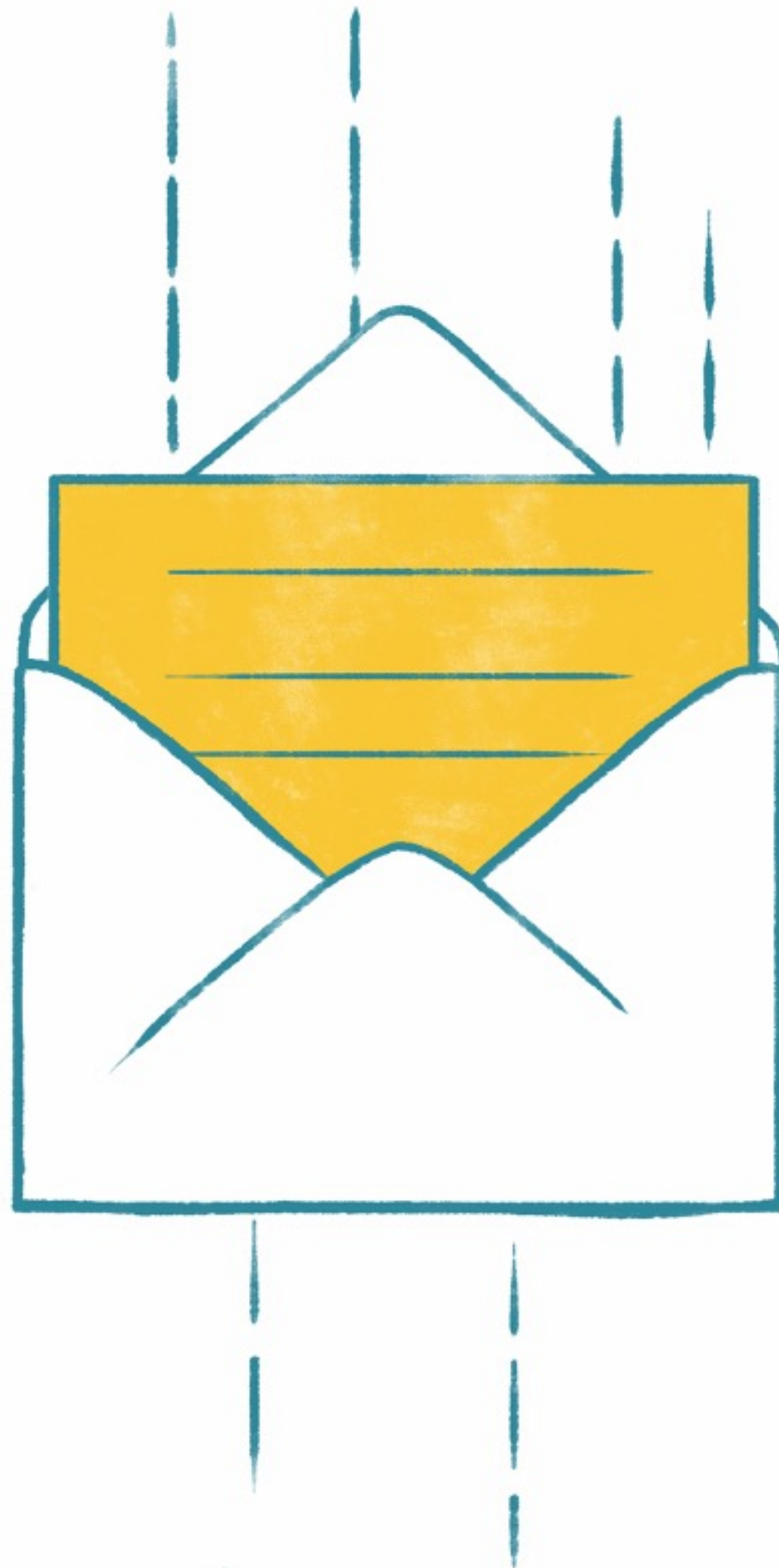
Contact Us!

Customer Success

Please direct clients to our wonderful Customer Success team for any support needs or questions. We're always more than happy to help!

support@frameworkhomeownership.org

Monday-Friday: 9 a.m. to 5 p.m. ET



Partnerships

Please contact our Partnerships team if you have any direct questions or need support surrounding your partnership or partner administrative needs! We're happily available by email at:

partners@frameworkhomeownership.org

