



AGENCY MANAGER GUIDE

CERTIFICATES



A photograph of a woman with dark hair in a braid, wearing a light-colored shirt, hugging a young girl with long dark hair wearing an orange top. They are positioned in front of a window with white frames. A thick teal diagonal line runs from the top left towards the bottom right, partially obscuring the image and text.

WHAT'S COVERED?

OVERVIEW

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 - Fix Incorrect Logo or Missing Certificate ID
 - Troubleshoot Inability to Access Certificate

EXAMPLE OF A
CERTIFICATE OF
COMPLETION



CERTIFICATE OF COMPLETION

THIS CERTIFICATE IS AWARDED TO

Firstname Lastname

Co-Borrower First Name

Co-Borrower Last Name

For Successfully Completing
The Framework® Homeownership Education Course

Congratulations on earning your homebuyer ed certificate. You're one
giant step closer to being a savvy, successful homeowner.

This certificate meets education requirements for some mortgages and down-payment
assistance products. *Framework® is administered by two HUD-Approved Intermediaries
and meets the National Industry Standards for Homeownership Education.

January 02, 2024

ryokgls804

Date of Completion

Certificate ID

*This certificate does not mean you are automatically approved for a mortgage product.

HOW LEARNERS ACCESS CERTIFICATES

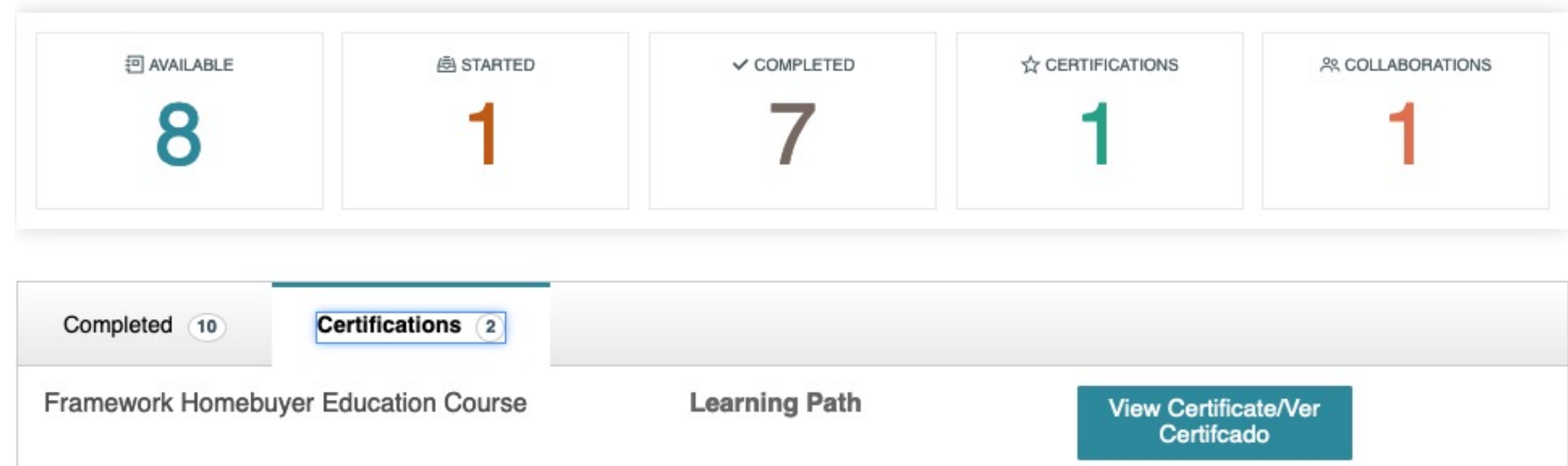
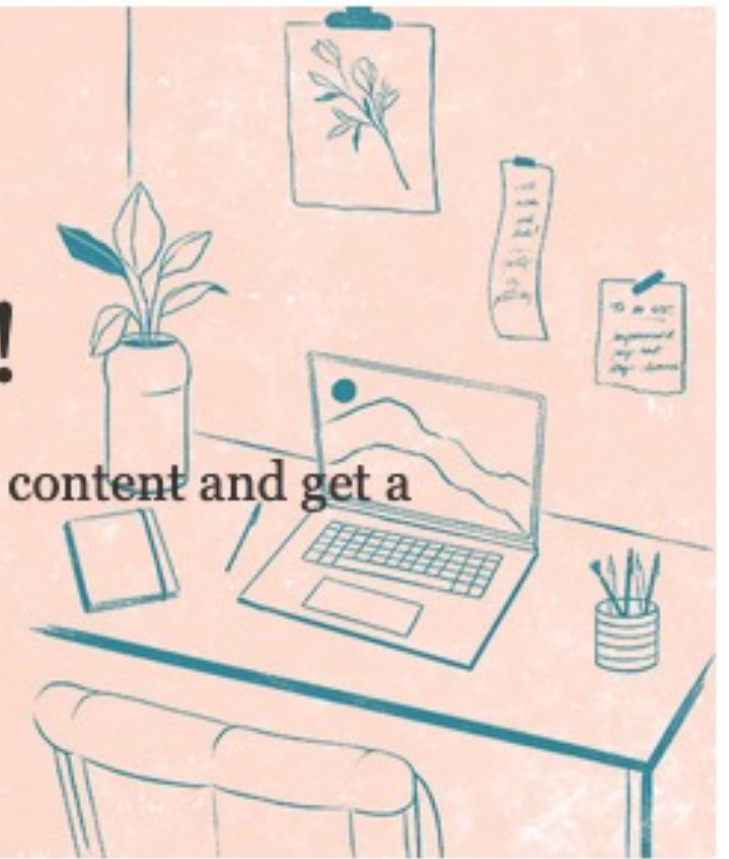
Learners must complete all 7 lessons of the course and score at least 80% on each of the lesson quizzes. Once this occurs, one of three things will happen depending on your organization's setup:

- **No Certificate Withholding:** The learner will receive their certificate of completion and can access this any time from their dashboard by going to the certifications tab and selecting View Certificate. learners also receive an email with a link to the certificate.
- **Certificate Withholding:** The learner should enter the advising activity and follow the instructions to schedule their appointment and submit their name to the advising approval queue. Once the advising session is marked complete, the learner will receive their certificate of completion and can access this any time from their dashboard by going to the certifications tab and selecting View Certificate. learners also receive an email with a link to the certificate.



Welcome to your Framework Dashboard!

This is your dashboard. You can think of it as home base; where you can see all of your content and get a sense of where you last left off and what's left to do.

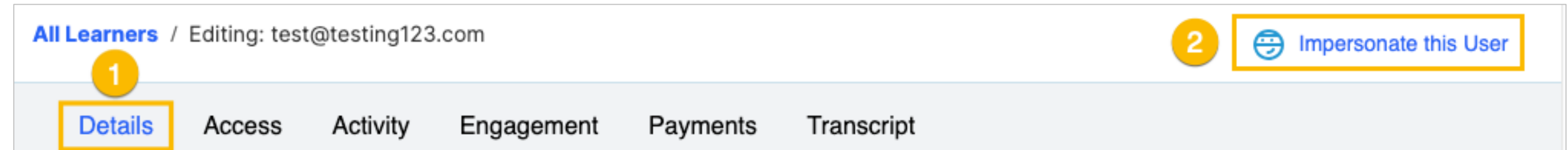


SEE THE LAYOUT YOUR LEARNERS SEE

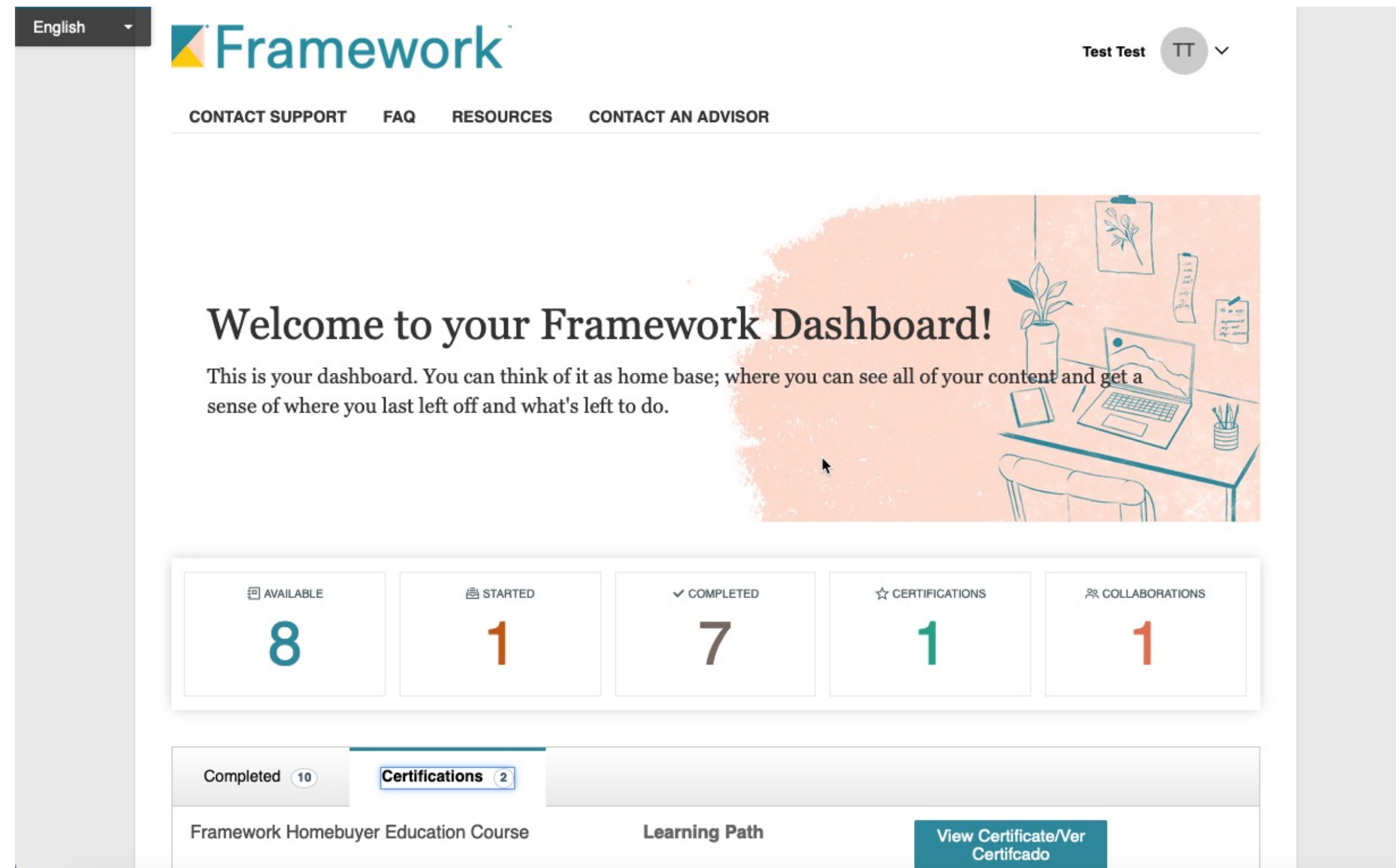
- From your manager account, you can choose to view client accounts as they would view their own accounts.
- Go to users > learners
- Once you've selected a learner from the list, you'll be taken right to the learner's details page where you can select "Impersonate this User."

** Note, this will log you out of your manager account, so you'll need to log back in again if you want to access your manager account*

Accessing the Impersonation Function as Manager:



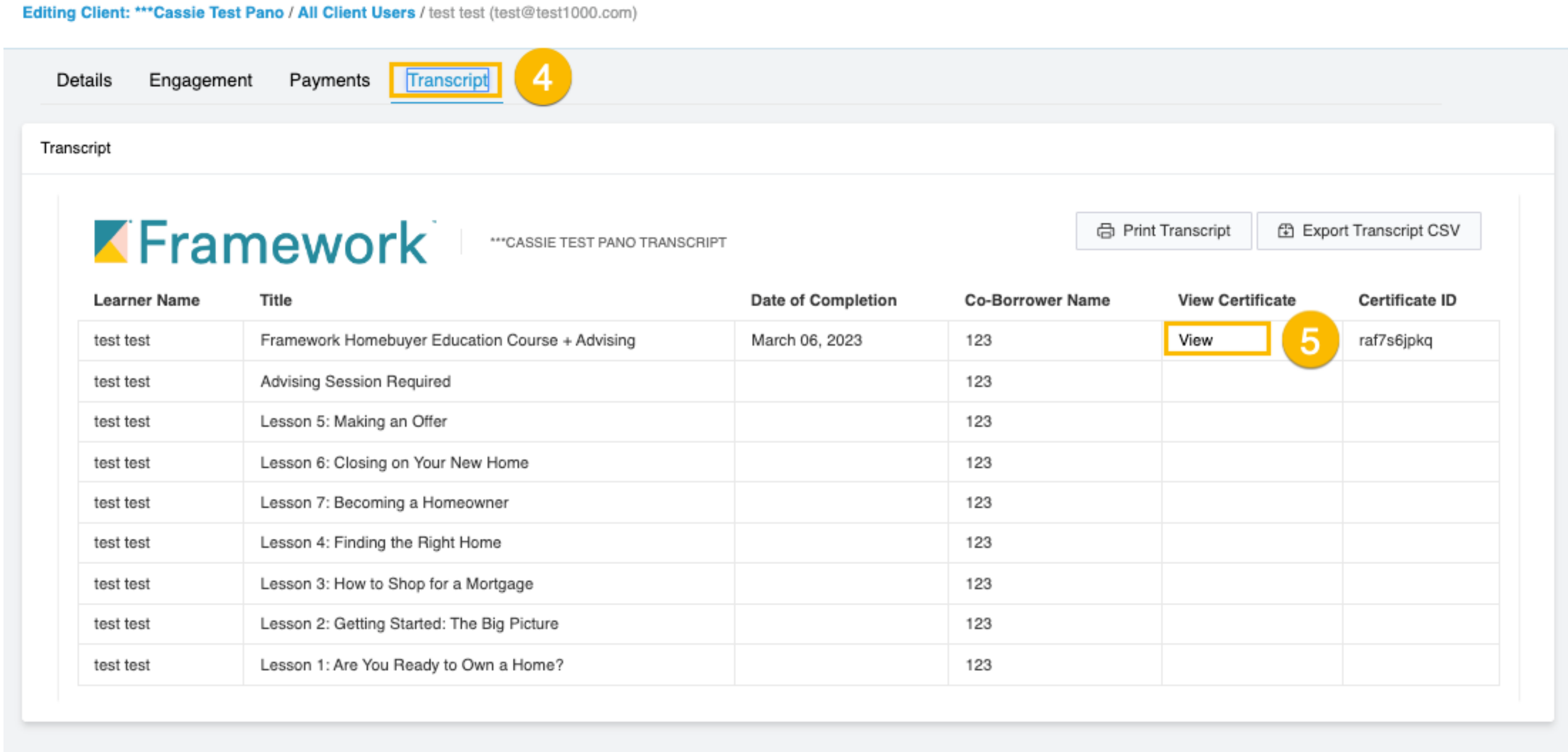
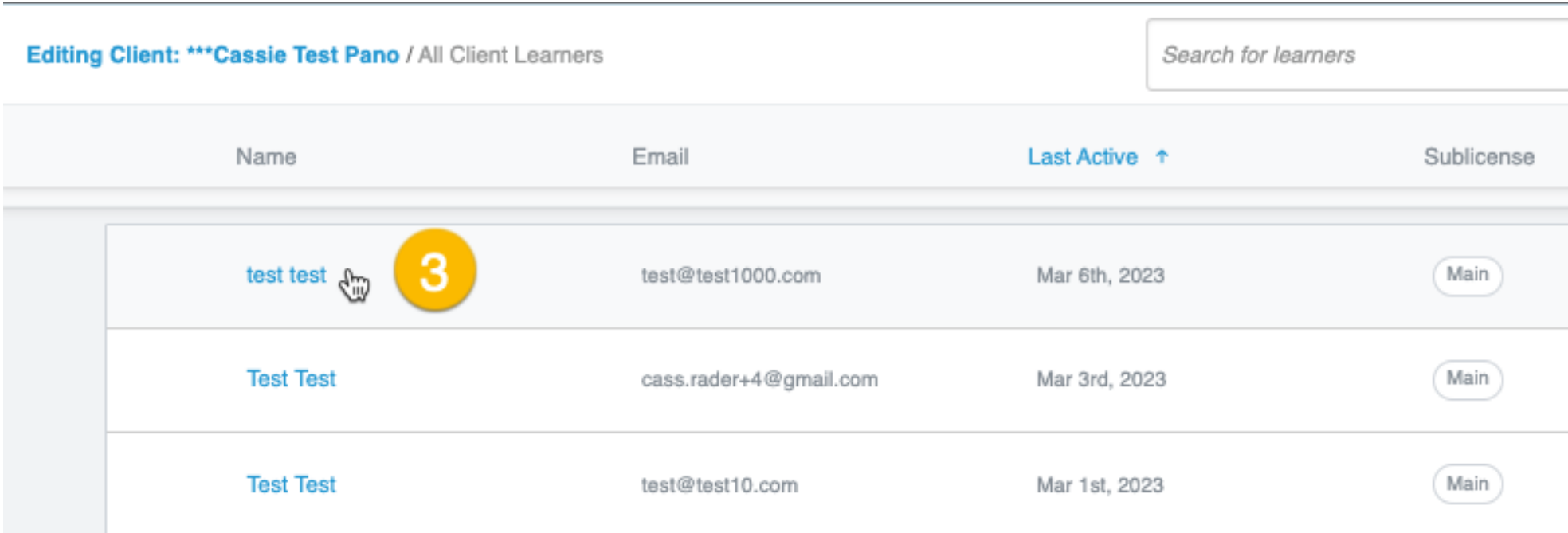
View Once You've Selected Impersonation:



HOW MANAGERS ACCESS LEARNERS’ CERTIFICATES

First, log into your LMS
manger account

- 1. Select “Users” from the
left menu
- 2. Select “Learners”
- 3. Search for then select the
learner whose certificate
you’d like to view
- 4. Click the tab that says
“Transcript”
- 5. Click View Certificate
next to the Framework
Homebuyer Education



Tip: If the certificate is not available, it’s likely because the learner still needs to complete a lesson, quiz, or has scored under 80% on a quiz and needs to increase their score. See page 12 for troubleshooting.

NOTIFICATIONS FOR CERTIFICATES



After learners have successfully completed and passed the course, they will receive an email with a link to log into their account and access their certificate.



Congratulations! You have successfully completed the Framework Homebuyer Education Course + Advising course. Wherever your journey takes you, Framework will continue to be at your side with tools and resources for smart homeownership. Click the link below to view and download your certificate.

[View Certificate](#)

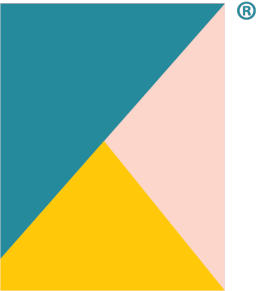
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[BLOG](#)

[ABOUT](#)



If you'd like to unsubscribe or manage your email preferences [click here](#).



TROUBLESHOOTING CERTIFICATES



The Name is Incorrect/Misspelled on the Certificate

If you need to update a name or add a co-borrower to a certificate, the customer can make the necessary updates by following [these steps](#). Then, they can contact Framework Customer Success to regenerate the certificate.

The Certificate ID# is Missing

If the Certificate ID# is missing, please have your client contact our Customer Success team. We'd be glad to make the necessary updates!

Framework

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TROUBLESHOOTING CERTIFICATES



The Logo on the Certificate is Incorrect

- This typically happens when a learner initially registers in a one partner experience and later requests to be moved to a new one.
- If you've opted for a co-branded certificate and the logo on a certificate is incorrect, please have your client contact our Customer Success team and we'll be glad to make any necessary changes.

The Certificate has Unusual Text on It

Example: *The certificate includes "Partner/Co-borrower" where the learner's name is located*

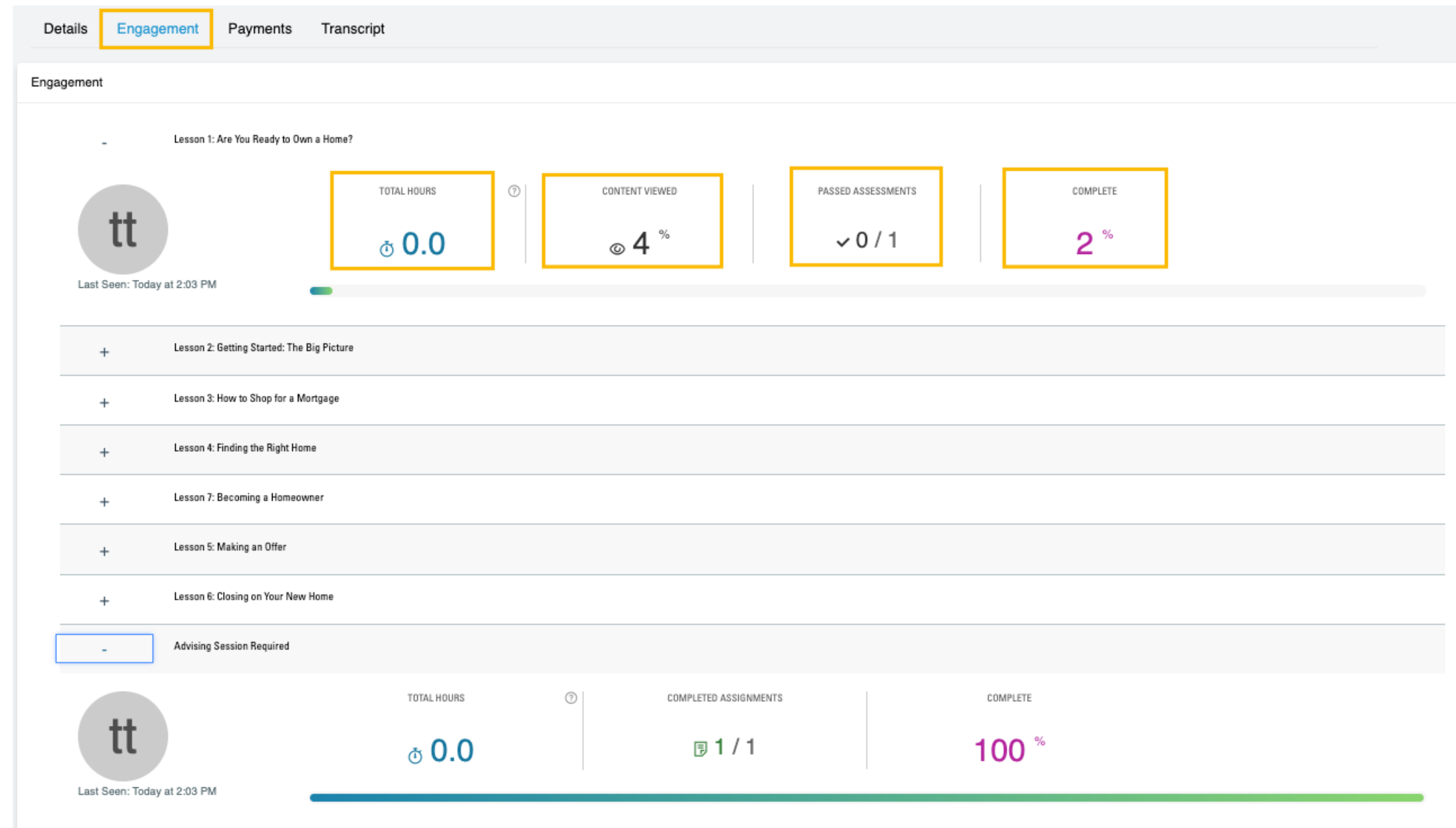
- If the certificate includes strange or unnecessary text, please contact Framework Customer Success and our team will help regenerate the certificate.

TROUBLESHOOTING CERTIFICATES



Unable to Access the Certificate

- First, check that all seven lessons are complete, and that each quiz has been passed.
★ You can see these details by going to a learner record and selecting the **engagement** tab. Then you can click on any of the lessons and see how much time a learner has spent and whether they have viewed all the content and passed the assessment (quiz)
- Make sure that the advising session is marked as complete (if applicable)
- If you've verified that all the above have been completed, contact Customer Success



Contact Us!

Customer Success

Please direct learners 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



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