Framework

PARTNER MANAGER GUIDE

EDUCATIONAL REVIEWS

Framework

WHAT'S COVERED?

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WHAT IS AN EDUCATIONAL REVIEW?

If a learner is unable to achieve a score of 80% in each of the seven lessons and they have used all ten quiz attempts in each lesson, they will need to contact our Customer Success team to schedule an Educational Review.

The Educational Review is a 30-minute phone call with a HUD certified homeownership advisor. During this call, the advisor and client will discuss key topics from the coursework. Time is also allotted for the client to ask any specific questions about the course.

Please Note:
- The Educational Review does not take the place of an advising session (if offering advising sessions)
- The Educational Review is provided at no additional cost to the client
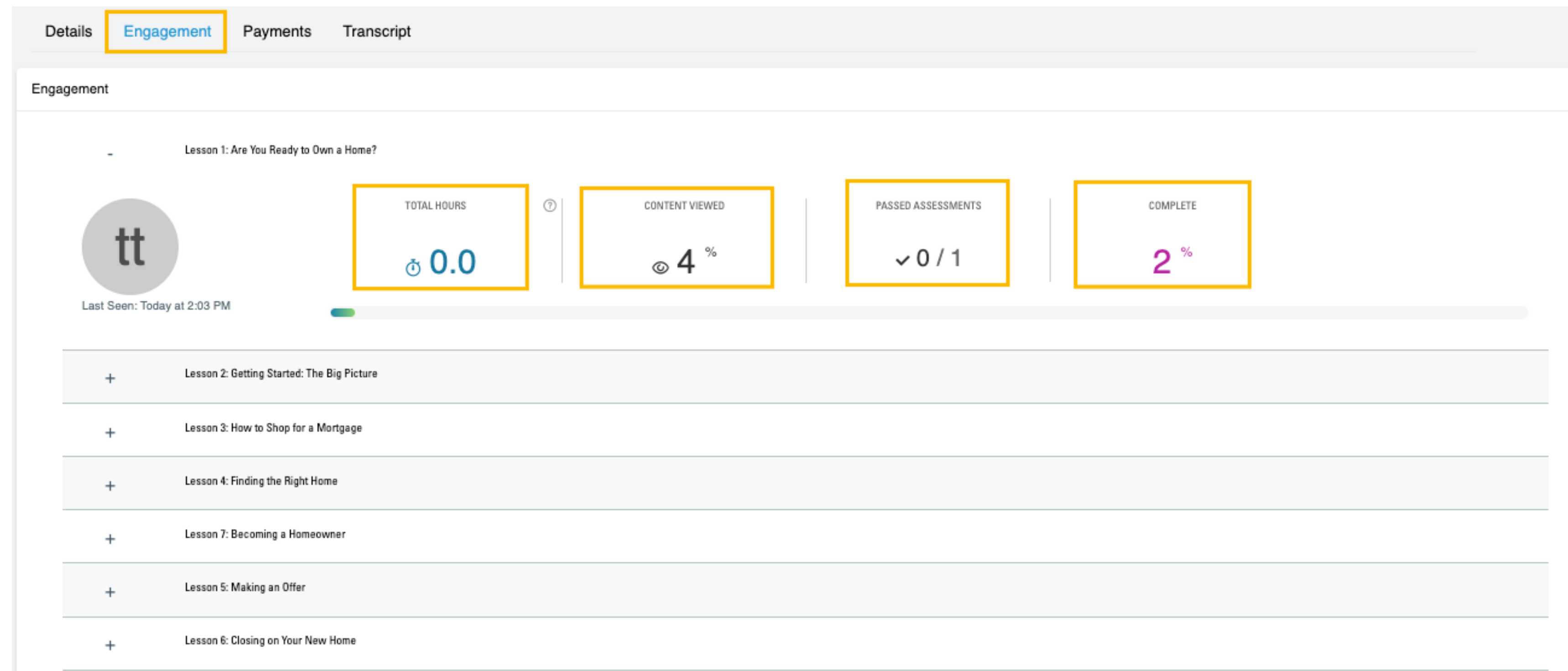
HOW TO SCHEDULE AN EDUCATIONAL REVIEW

- **After your client verifies that they have completed all available quiz attempts in each of the seven lessons, please ask them to contact our Customer Success team to schedule an Educational Review.**
  - o Reviews are available Monday through Friday. Appointments are available from 10:00 AM to 7:30 PM ET.

- **Educational Reviews can be completed in your client's native or preferred language.**
  - o Through the assistance of interpreters, we can offer the Educational Reviews in any preferred language. It's our goal to help the client be as informed and as confident as possible!

HOW CAN I TELL WHEN AN EDUCATIONAL REVIEW IS NEEDED?

ADMIN VIEW

To start, verify that all seven lessons have been completed by locating the learner (users > learners > click learner's name) and going to the engagement tab for that user.

From the page that opens, you can select each lesson to see which lessons are 100% complete and which have passed assessments.
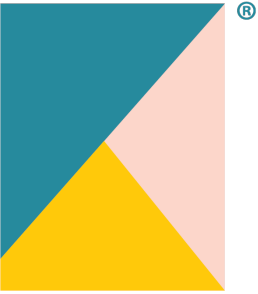
HOW CAN I TELL WHEN AN EDUCATIONAL REVIEW IS NEEDED?

ADMIN VIEW CONT'D

If you want to verify how many quiz attempts are remaining for each lesson quiz, you can use the impersonate function.

1. Go to users > learners > click on the name of the user you want to investigate.
2. From the details page, look to the top right corner and select "Impersonate this user."

Editing Client: ***Cassie Test Pano / All Client Users / test test (test@test1000.com)   Impersonate this User

Details   Engagement   Payments   Transcript

Details
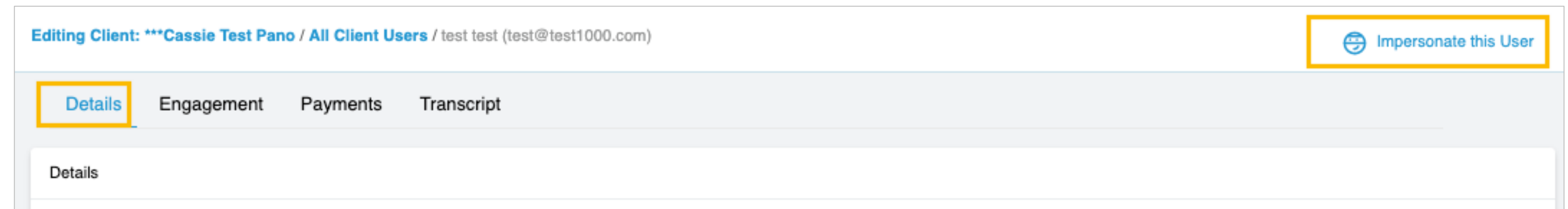
📝 Note: *Impersonating a user will log you out of your manager account. Once you've completed your review from the learner side, you'll can log back into your manager view.*

HOW CAN I TELL WHEN AN EDUCATIONAL REVIEW IS NEEDED?

ADMIN VIEW, CONT'D

3. Once you are in the learner view you may see several tabs:
   - **My Learning:** Any lessons started/in progress (but not complete).
   - **Learning Paths:** We refer to the Framework course in its entirety as a learning path. Clicking this will take the user to a list of all the course requirements and shows them where they are in their certification journey.
   - **Completed:** Lessons the user has completed and passed.
   - **Certificates:** This will not appear until a user has earned a 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.

📋 AVAILABLE	🎒 STARTED	✓ COMPLETED	👥 COLLABORATIONS
0	7	0	0

My Learning 6   Learning Paths 1   Completed 1

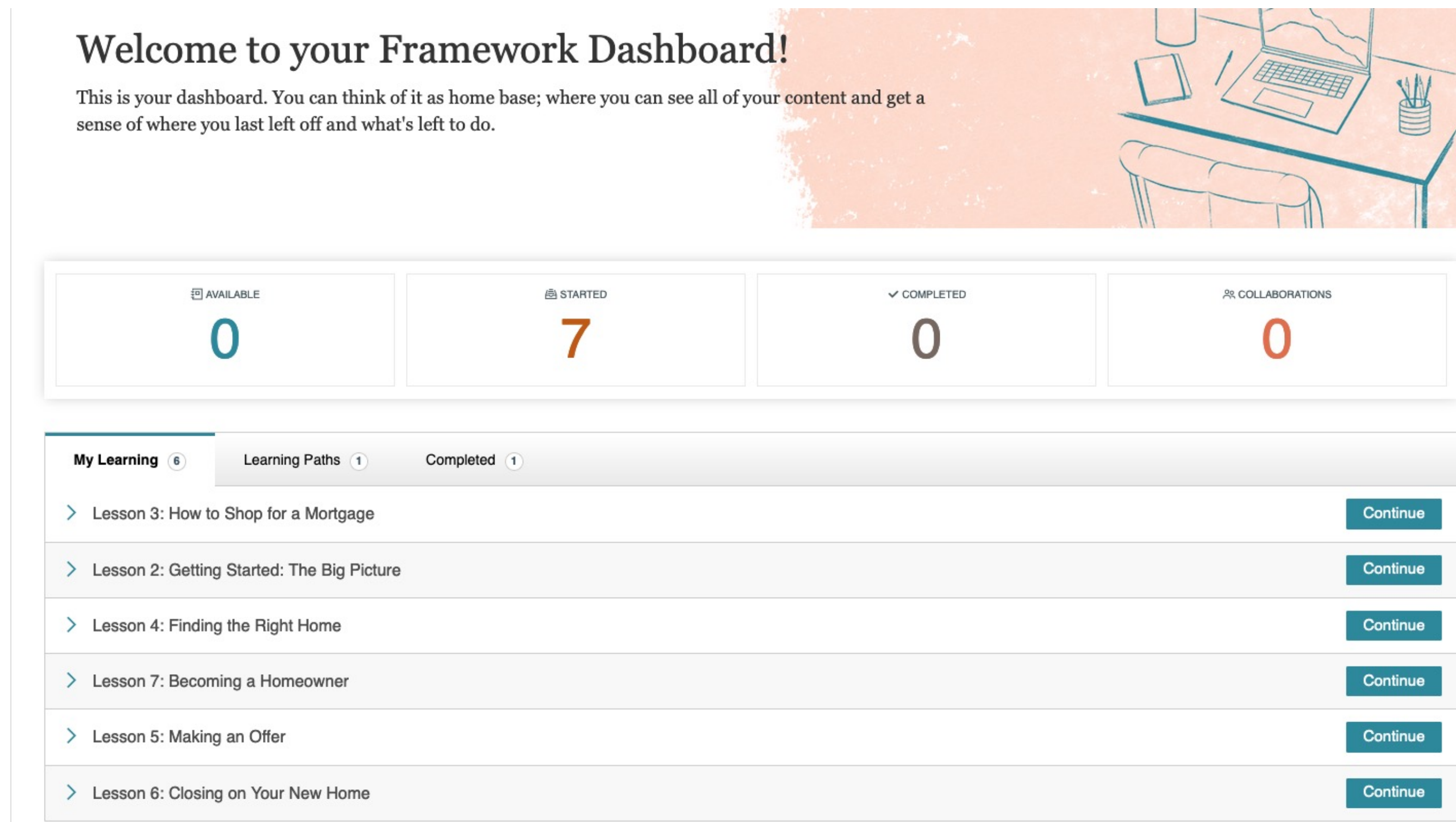|	
∨ Lesson 3: How to Shop for a Mortgage	Continue
∨ Lesson 2: Getting Started: The Big Picture	Continue
∨ Lesson 4: Finding the Right Home	Continue
∨ Lesson 7: Becoming a Homeowner	Continue
∨ Lesson 5: Making an Offer	Continue
∨ Lesson 6: Closing on Your New Home	Continue

You can choose to go directly into any ongoing lessons by clicking the continue button to the right of the lesson name or you can click on the learning path, and then select the lesson you wish to visit.

HOW CAN I TELL WHEN AN EDUCATIONAL REVIEW IS NEEDED?

ADMIN VIEW,CONT'D

1. Once you are in the lesson, go to the menu located on the left and scroll down until you see the quiz and click on this.

2. To the right you should see the number of quiz attempts remaining
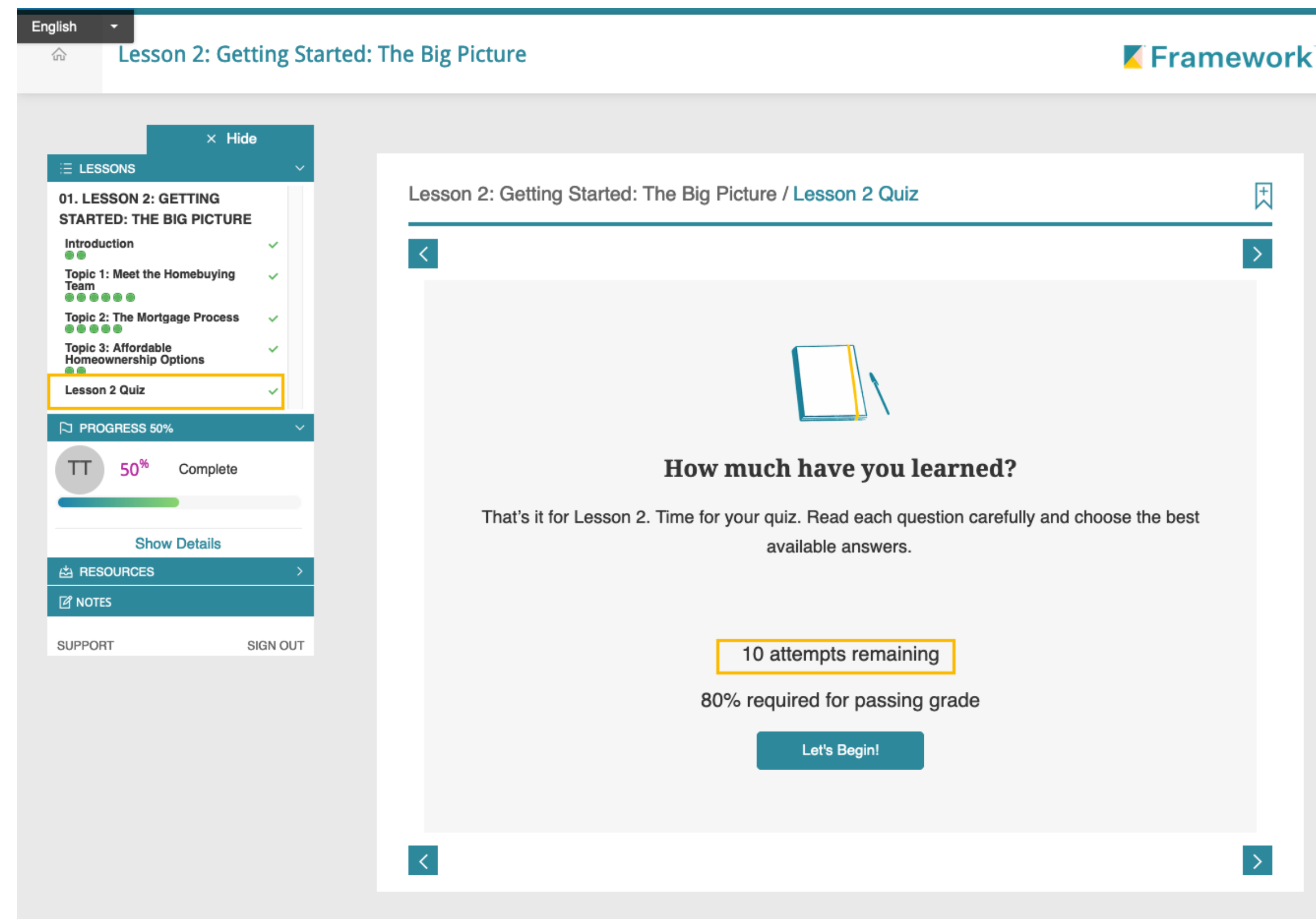
📝 *NOTE: The quiz will not be accessible until the user viewed each page within the lesson. If you cannot click the quiz, it means the user still needs to finish going through the lesson content. If you encounter any lessons like this, exit the lesson so that the user may first finish the content.*

NEXT STEPS AFTER COMPLETING AN EDUCATIONAL REVIEW

- Within 24 hours of a completed ed review, the Customer Success team will set the user's course to completed and passed. They will update our client records to note that an ed review was required.

- If an advising session is part of the course requirements, the user should enter that advising activity which will then allow the agency manager to mark the session as complete once conducted.

- User will be able to access their certificate

EDUCATIONAL REVIEW HIGHLIGHTS
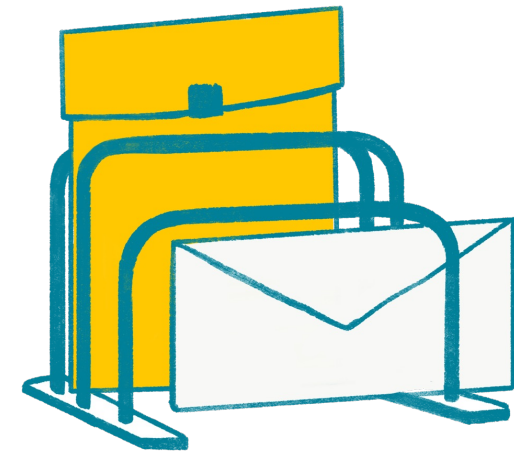
If your client needs to complete an educational review, please have them contact our Customer Success team directly by email at support@frameworkhomeownership.org

An Educational Review does not replace any required Advising Sessions.

The Educational Review is a resource for clients who are unable to score 80% on each quiz after making all available attempts for in each of the seven lessons. The Educational Review serves as an opportunity for clients to better grasp key topics of the course. If your agency requires an Advising Session, the client will still need to attend the session after completing the Educational Review to successfully complete the course.

If an Advising Session is completed before the Educational Review, the client will still need to complete the Educational Review in order to obtain their certificate.

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: 8 a.m. to 4 p.m. CST

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

Framework