



# Optimizing Continuing Education Processes: A Deep Dive into CertMetrics Capabilities

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# Welcome



# What Is Continuing Education

- Definition: Continuing Education (CE) is the process of acquiring new knowledge or skills to enhance one's professional development after initial assessment has been completed.
- Objective: To ensure individuals stay updated in their fields and maintain the minimal standards of practice.

# Common Challenges in CE

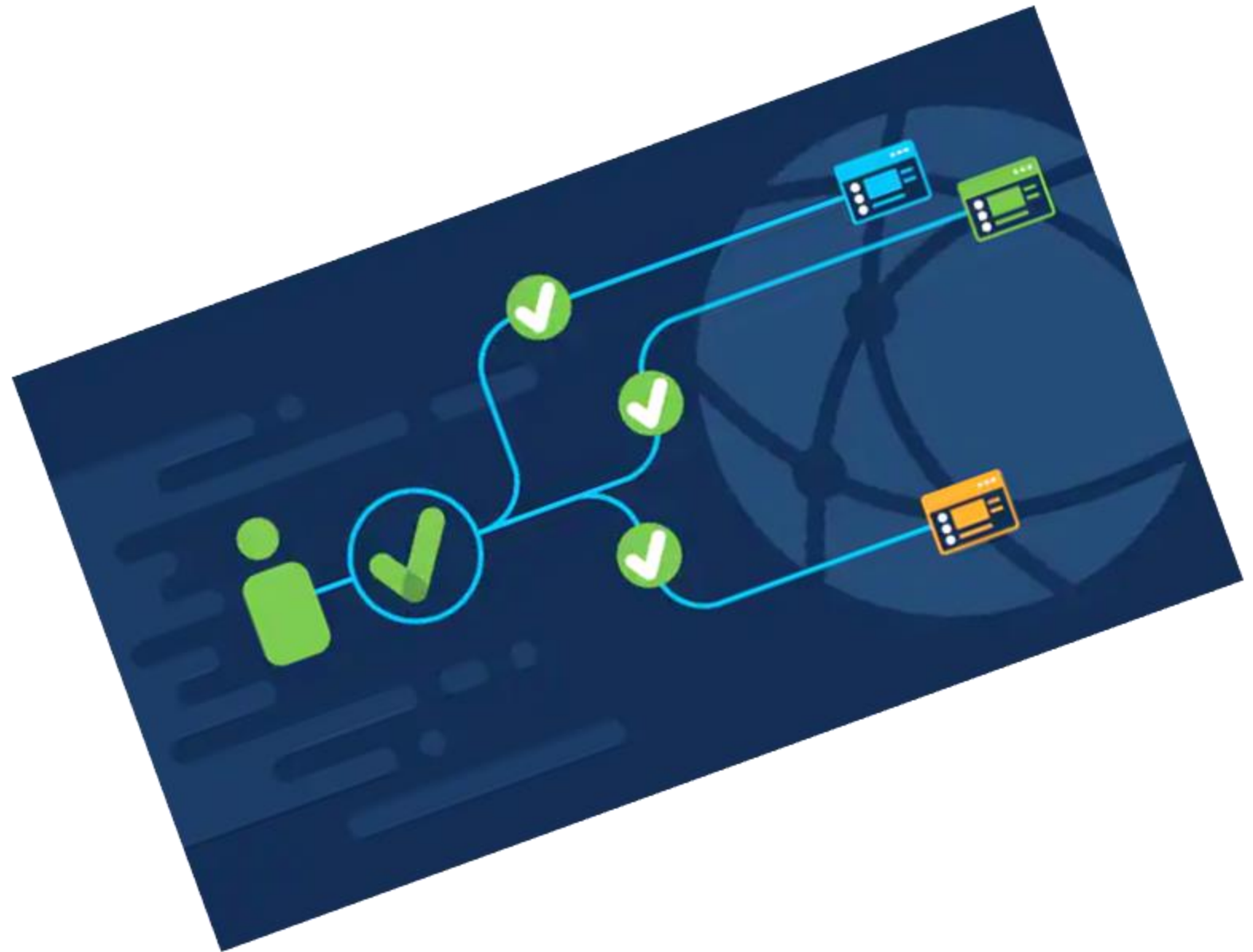
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Arduous Process

Lack of Technology Support

Validation Issues

Ensuring Fairness



# The Traditional Approach To CE

- Historically, CE often required taking assessments again.
- Preparing for an assessment is generally a labor-intensive process.
- Challenges included data collection, matching, and processing.
- Consistency across candidates is challenging



# Modernizing The CE Experience

- **New approaches to CE have started to emerge.**
  - Training
  - Labs
  - Longitudinal CE
  - Linked Credentialing
  - Flexibility

Continuing Education Upload

1 Select Item

Intent*	Recertification	×
Credential*	OSA Core Credential	×
Item Group*	Continuing Education	×
Item Name*	Training	×

NEXT



# CertMetrics Support for Continuing Education



Welcome to the Superhero Certification Program!!!

Becoming Certified gives your career a boost and offers many benefits.



# CertMetrics Support for Continuing Education

- Requirements-based renewals
- Activity/points-based renewals (often called continuing education)
- Hybrid path (combination of requirements-based and activity-based)



# Requirements-based Continuing Education Model

## Initial Track Requirements

**Track:** Standard Superhero Certification

**Valid Period:** 2 years

### Requirements

#### Assessment (complete two)

- **Sup-001:** Maintaining Your Alias
- **Sup-002:** Basic Moves and Counters

#### Agreement (complete one)

- **Agr-001:** Superhero Ethics Agreement

## Renewal Track Requirements

**Track:** Standard Superhero Recertification

**Extension Period:** 2 years

### Requirements

#### Certification (complete one)

- **SSC-001:** Active Standard Superhero Certification

#### Complete Training or Assessment Path

##### - Training (complete two)

- **CSR-001:** Alias and Disguises Upgrades
- **CSR-002:** Basic Moves and Counters Upgrades

##### - Assessment (complete one)

- **Sup-UU1:** Active Standard Superhero Upgrade

# Activity/Points-based Continuing Education Model

## Initial Track Requirements

**Track:** Standard Superhero Certification

**Valid Period:** 2 years

### Requirements

#### Assessment (complete two)

- **Sup-001:** Maintaining Your Alias
- **Sup-002:** Basic Moves and Counters

#### Agreement (complete one)

- **Agr-001:** Superhero Ethics Agreement

## Renewal Track Requirements

**Track:** Standard Superhero Recertification

**Extension Period:** 2 years

### Requirements

#### Certification (complete one)

- **SSC-001:** Active Standard Superhero Certification

#### Complete CE Path

#### - **CEUs/Points (Complete 30) 21 out of 30**

Training: 11 (Max 30)

Conferences: 10 (Max 10)

# Hybrid Continuing Education Model

## Initial Track Requirements

**Track:** Standard Superhero Certification

**Valid Period:** 2 years

### Requirements

#### Assessment (complete two)

- **Sup-001:** Maintaining Your Alias
- **Sup-002:** Basic Moves and Counters

#### Agreement (complete one)

- **Agr-001:** Superhero Ethics Agreement

## Renewal Track Requirements

**Track:** Standard Superhero Recertification

**Extension Period:** 2 years

### Requirements

#### Certification (complete one)

- **SSC-001:** Active Standard Superhero Certification

#### Renewal (complete assessment or CE path)

#### Assessment (complete one)

- **Sup-UU1:** Active Standard Superhero Upgrade

#### CEUs/Points (Complete 30) 21 out of 30

- **Training:** 11 (Max 30)
- **Conferences:** 10 (Max 10)

## Key Question to Ask

Does your program need continuing education activities/points/units or will requirements-based renewals work?

# Renewal Track Requirements for a Longitudinal Assessment Renewal



**Track:** Standard Superhero Recertification

**Extension Period:** 1 year

## Requirements

### Certification (complete one)

- SSC-001: Active Standard Superhero Certification

### Renewal (Complete one of the two assessment paths)

#### Path 1 – Longitudinal Assessment (complete 9 out of 12)

- January 2024 Mini-Assessment
- February 2024 Mini-Assessment
- March 2024 Mini-Assessment
- April 2024 Mini-Assessment
- May 2024 Mini-Assessment
- June 2024 Mini-Assessment
- July 2024 Mini-Assessment
- August 2024 Mini-Assessment
- September 2024 Mini-Assessment
- October 2024 Mini-Assessment
- November 2024 Mini-Assessment
- December 2024 Mini-Assessment

#### Path 2 – Update Assessment

- **Sup-UU1:** Active Standard Superhero Upgrade



# Requirements-based Renewals

- Defined set of requirements
- Requirements tend to be homogeneous
- Linear (clear paths for completion)



## Renewal Track Requirements

**Track:** Standard Superhero Recertification

**Extension Period:** 2 years

### Requirements

#### Certification (complete one)

- SSC-001: Active Standard Superhero Certification

#### Complete Training or Assessment Path

##### - Training (complete two)

- CSR-001: Alias and Disguises Upgrades
- CSR-002: Basic Moves and Counters Upgrades

##### - Assessment (complete one)

- Sup-UU1: Active Standard Superhero Upgrade



# Activity/Points-based Renewals

- More open set of requirements
- Requirements tend to be various
  - Effort (1 hour vs. two-day training course)
  - Availability (conferences, labs, trainings, etc.)
- Non-linear (more flexibility for completion)



## Renewal Track Requirements

**Track:** Standard Superhero Recertification

**Extension Period:** 2 years

### Requirements

#### Certification (complete one)

- SSC-001: Active Standard Superhero Certification

#### Complete CE Path

#### - CEUs/Points (Complete 30) 21 out of 30

Training: 11 (Max 30)

Conferences: 10 (Max 10)


What are our program “rules” for renewals?

# Renewal and Expiration Rules

- How is the credential extended?
  - Extended from the date of the last activity completed?
  - Extended from the current expiration date?
  - Extended to match a company renewal cycle?
- Does your program provide a grace period and if so, how long?
- Does renewing the credential extend other credentials?
- What happens if the credential expires?
- Can I manually override dates?
- How do badges and e-certificates update?
- How is progress tracked?



# What happens when the candidate renews or expires?

Status	Active Date	Last Extended Date	Inactive Date	Expire Date	Series ID 
Active	2019-12-17	2019-12-18	2024-12-18	2025-01-18	125958
Expired	2018-09-20		2020-09-20	2020-10-20	85489
Expired	2021-06-29		2023-06-29	2023-07-29	85489
Active	2023-10-11		2025-10-11	2025-11-11	85489
Active	2021-12-23	2021-12-24	2024-12-24	2025-01-24	57047

# What happens when the candidate renews or expires?

## Continuing Education Progress

**In Progress** 83%

25 OF 30 COMPLETED

**Infrastructure Professional**  
INPR

PROGRESS START DATE  
2023-10-05

PROGRESS END DATE  
2025-11-11

[VIEW CREDENTIAL >](#)

**In Progress** 31%

25 OF 80 COMPLETED

**Advanced Network Security**  
ANS

PROGRESS START DATE  
2023-10-05

PROGRESS END DATE  
2025-11-11

[VIEW CREDENTIAL >](#)

### CURRENT PROGRESS

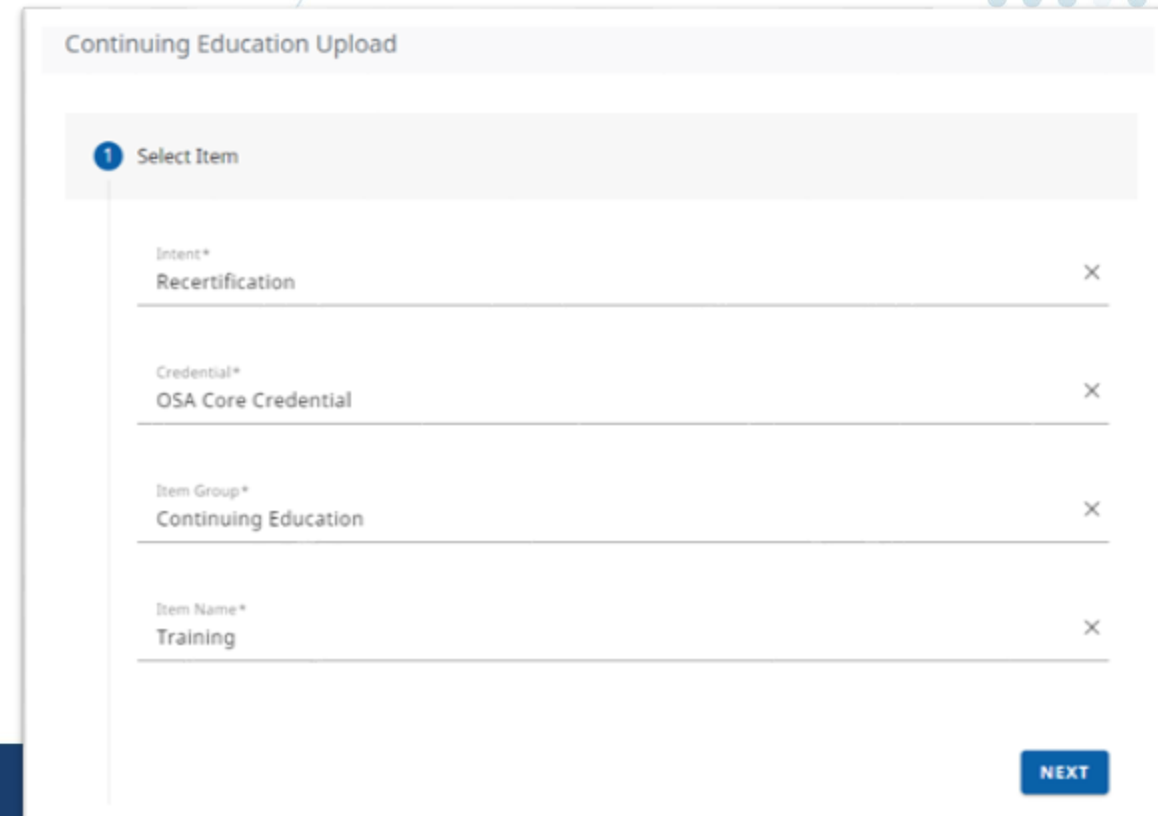
- 1 - Required: All (3) Completed: 1
  - 1.1 - Required: All (1) Completed: 1
    - CertMetrics Agreement** ⓘ
  - 1.2 - Required: 300
    - Pay \$300 CE fee
  - 1.3 - Required: 40 Completed: 20
    - Completed: 20 ⓘ
    - Training**
    - Conferences
    - Course

## Continuing Education Progress

Status	Name	Code	Progress Start Date	Progress End Date	Progress
In Progress	<a href="#">Infrastructure Professional</a>	INPR	2023-10-05	2025-11-11	25 of 30 83% <div style="width: 83%; height: 10px; background-color: #007bff;"></div>
In Progress	<a href="#">Advanced Network Security</a>	ANS	2023-10-05	2025-11-11	25 of 80 31% <div style="width: 31%; height: 10px; background-color: #007bff;"></div>

# Data Rules

- How will continuing education data be imported into CertMetrics?
  - Real-time (API)
  - Data feed (daily)
  - Candidate-driven
  - Internally-entered
- How do we match data to the candidate?
- Can the uploaded items require a review?
  - What documentation is required?
- Can we audit and invalidate items?



Continuing Education Upload

1 Select Item

Intent*	Recertification	x
Credential*	OSA Core Credential	x
Item Group*	Continuing Education	x
Item Name*	Training	x

NEXT

# Credential and Renewal Logic Rules

- What are the paths for certification and renewal?
- Are there fees associated with renewals?
- How do I update or change logic?
  - Do I need rebuilds?
- For activity/points-based renewals...
  - What are the major 'buckets' for collecting activities?
    - Are activities shared across multiple credentials?
    - Is there a max number of CEUs (points) per activity or bucket?
  - How are points assigned by activity?
  - When does a candidate start earning CEUs (points)?
  - Do CEUs (points) carry over?



# Communication Rules

- How do we effectively communicate with the candidate?
  - Self-service progress tracking
  - Transactional emails
    - New Credential
    - Credential Extended
    - 30/60/90 Credential Reminders
    - Credential Expiration
    - CE activity added
  - Announcements







## Candidate Portal Dashboard

TIMOTHY P SMITH

### Announcements

VIEW ALL < >



2022-08-15

#### **Congratulations on your NEW BENEFIT!**

You have earned a benefit for your OSA Professional Certification!

VIEW MORE >



2015-08-26

#### **Welcome to our Super Hero Certification Program!**

Becoming Certified gives your career a boost and offers many benefits.

VIEW MORE >

### Check This Out!

Learn more about our program today. Visit our

2015-08-26

GO BACK



MORE INFORMATION

### Welcome to our Super Hero Certification Program!

Becoming Certified gives your career a boost and offers many benefits.

#### What to do first

We are excited you have chosen to learn about how holding one of our credentials can benefit your career. To get started on your certification journey, be sure to:

- Complete your [profile](#)
- Reading how others have [successfully completed the journey](#)
- Review your exam [eligibilities](#)
- Learn more about the [exams](#) , [exam requirements](#) , and [credentials](#)
- Review our study [guides](#)
- Consider signing up for [training](#) or taking a [practice exam](#)
- Register with a test delivery provider to [schedule your exam](#)
- Review the [recommendations](#) and what to expect when taking an exam

After completing your first exam, check back to see how you did and receive further instructions.

ne Solutions

# Communication Rules

- How do we reward the candidate?
  - Transcripts
  - E-certificates/logos
  - Badges
  - Benefits

Timothy P Smith  
TRANSCRIPT

Alpine  
Testing Solutions

Search

Items per page: 25 1 - 17 of 17

Type	Name	Group	Active Since	Inactive ↓
Credential	Certification 00057 (C57)	Sales and Marketing Certifications	1999-05-04	Never
Credential	OSA Developer v4 (OSA-D4)	IT Credentials	2021-05-03	Never
Credential	OSA Developer v5 (OSA-D5)	IT Credentials	2021-05-13	Never
Credential	Professional Security Credential (CMEITC2007)	Career Certifications	2021-09-01	Never
Credential	CertMetrics IT Education Professional CE (CIEPCE)	Career Certifications	2021-09-10	2024-09-10
Credential	OSA Professional (OSAP)	IT Credentials	2021-09-01	2024-09-01
Exam	[300-001] Exam 00001		2004-03-26	
Exam	[300-002] Exam 00002		2022-09-01	
Exam	[680-404] Exam 00057		1999-02-08	
Exam	[680-407] Exam 00060		1999-01-13	
Exam	[680-607] Exam 00103		2003-03-16	
Exam	[680-811] Exam 00109		2006-01-24	
Exam	[ASE-212] Exam 00341		1999-05-04	
Exam	[OSA-101] OSA Sales Associate Exam		2015-10-01	
Credential Requirement	Cert Agreement 1	Participation	1998-09-26	
Credential Requirement	Cert Agreement 1	Participation	1998-11-13	
Credential Requirement	Cert Agreement 1	Participation	1999-01-30	



# OSA

Timothy P Smith

Has successfully completed the requirements to be recognized as

**OSA Developer v5**

on Thursday, May 13, 2021



Andrew Adams, President & CEO

Validate my credentials at  
<https://www.certmetrics.com/cmdemo/public/verification.aspx>

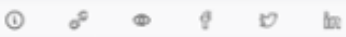
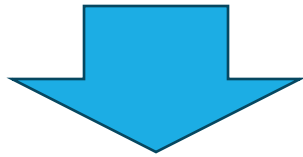
Active

CREDENTIAL

**Professional Security Credential**


EXPIRES  
Never

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**Blair Harris**  
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API.CERTMETRICS.COM  
**Professional Security Credential**  
The OSA Security Professional is awarded to candidates who demonstrate...



Professional Security Credential




**ISSUER DETAILS**

**VIEWS**  
Alpine Testing

**URL**  
[Visit](#)

**BADGE DETAILS**

<b>ISSUED TO</b> Timothy P Smith	<b>VIEWS</b>
<b>DATE EARNED</b> 2021-09-01	<b>VALID THROUGH</b> Forever
<b>CRITERIA</b> <a href="#">Visit</a>	
<b>DESCRIPTION</b> The OSA Security Professional is awarded to candidates who demonstrate sufficient competency within the security field including the protection and securing of Personal Identifiable Information (PII) and identification, prevention and mitigation of security risks . Candidates are tested in the following areas:	


**Unclaimed** 

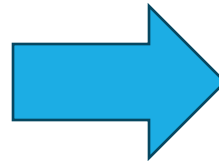
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**Certification Exam Discount**  
50% Off Your Next Exam or Renewal


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**Claimed** 

INDIVIDUAL TOKEN  
**OSA Expert Exam Voucher (OSAEX)**  
Discounts and Vouchers

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2024-09-01

TOKEN  
65CE12B13A20

URL  
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